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THE TRUE MEASURE OF SUCCESS

"To judge a developer on just a single criteria, such as revenue, doesn't paint the full picture."

The last year has been a tremendously exciting time to be in the games industry.

We are now well and truly into the current console cycle, while the PC games market is being pushed to the next level by Windows 10 and Steam. The growth in popularity of the mobile market also continues at a healthy rate and is fast approaching a mature state.

At the heart of every single one of the titles that have achieved success – *Fallout, The Witcher, Halo, Splatoon*, the list goes on – is a brilliant development team. These vary in size but all are at the very top of their game and deserving of recognition.

We're proud to sponsor the Develop 100 in its 10th anniversary year. What makes this ranking so unique and authoritative is the special criteria by which inclusion is secured: revenues raised; review scores and quality; reputation amongst the industry. To judge a studio on just one of those criteria doesn't paint the full picture.

Congratulations to all the studios listed in the Develop 100 2015. There is no greater badge of honour in the video game development community.

Brett Morris, CEO, Testronic Labs

THE DEVELOP 100: HOW WE DID IT

This is a list of the top games studios around the world. Where possible we have focused on dev teams responsible for specific games and titles, although in some instances – such as Nintendo and NCsoft – we had to choose company collectives to represent a cluster of teams.

The ranking is calculated upon a proprietary methodology that takes into account specific metrics: revenue and review score. For revenue, we have calculated estimates for Sept 2014 to Aug 2015 based on: publicly available financial statements; company announcements about sales figures; publicly available GfK data published in the likes of *MCV, GamesMarkt, Gamasutra* and others; off-the-record briefings from specific companies; independent data from trackers such as SteamSpy; mobile tracking supplied by Priori. Review score data is taken from Metacritic.

We've also cross-referenced our list by assigning 'industry standing' to key entrants based on the credibility of their studio's brand and products. We calculated this undisclosed value after looking at business development activity, awards and accolades, presence of games on the likes of YouTube and publisher and investor relationships.

1 SUPERCELL

ABOUT

Country: Finland

www.supercell.com

Keener pundits and spectators will find it no surprise that Supercell, the Finnish studio formed just five years ago, is top of the pile.

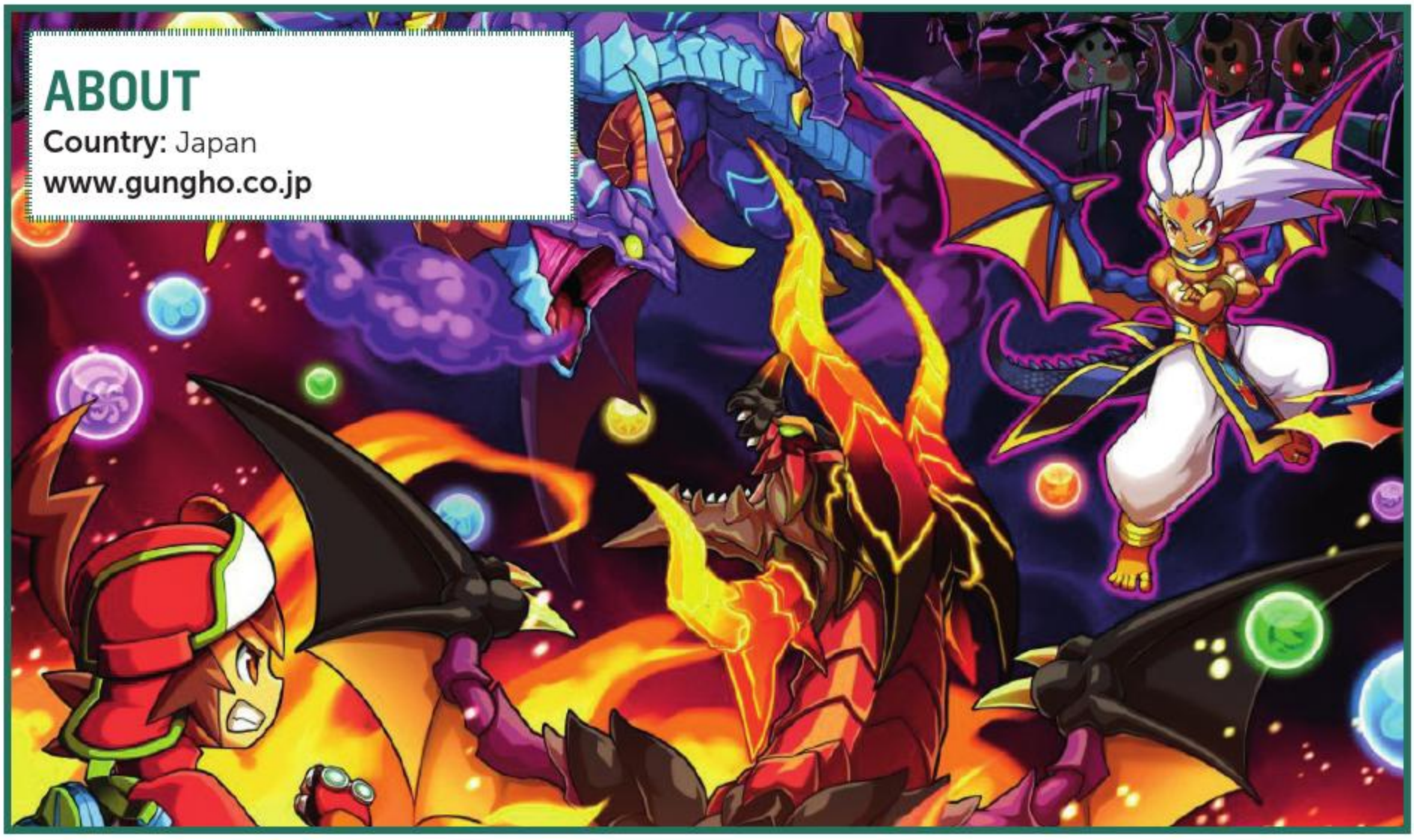
Take revenue performance in prior years into account and then app store performances in 2015, and it's very possible the firm will have broken the $2bn revenue barrier this year.

If our calculations are close to correct, Supercell will have done this in the most impressive fashion with a very strict selection of games. This is not a mobile company that banks on a massive portfolio of games; at the time of writing it has just three active F2P mobile titles – *Hay Day, Clash of Clans* and *Boom Beach*.

Clash of Clans is biggest, accounting for what must be roughly two thirds of the firm's revenue, going by Priori Mobile chart data and other estimates. But of course the firm's peers would dream of having a *Hay Day* or a *Boom Beach* in their stable, let alone a colossus like *Clans*.

You could write a whole book on why those games have been successful, but for us the most interesting has been the fact Supercell is unafraid of killing unsuccessful games swiftly. Five games – *Gunshine, Pets vs Orcs, Battle Buddies, Spooky Pop,* and *Smash Land* – were given a few months of life through soft launches but dropped as they failed to take hold.

GUNGHO ONLINE ENTERTAINMENT 2



ABOUT

Country: Japan

www.gungho.co.jp

In many ways, GungHo is the other side of the Supercell story. Although a separate enterprise, best known for Japanese mobile hit *Puzzle & Dragons*, GungHo bought a majority controlling stake in Supercell mid-2015 – a move supported by GungHo parent Softbank, the telecoms giant.

We estimate GungHo revenues are circa $1.5bn for the last 12 months, which combined with Supercell gets them well beyond $3bn.

GungHo started out in console games many years ago, but *Puzzle & Dragons* is the revenue driver these days. The dungeon crawler F2P title is now three years old and nearing the 50m download mark. The core F2P mechanics are all there in a combat-based round-driven title with multiple in-game currencies. Where it innovated, though, was how it blended *Pokémon*-style evolving monster elements with match-three gameplay, creating something fresh, accessible and yet deep.

It's not for everyone, though – the huge chart-topping success in Asia was never identically replicated in the West, most likely down to player tastes. Nevertheless, the global commercial success of this brand is to die for, and GungHo has exploited the franchise with a variety of cross promotions with other big mobile and online hits, and even a Nintendo 3DS spin-off.

3 NINTENDO

ABOUT

Country: Japan

www.nintendo.com

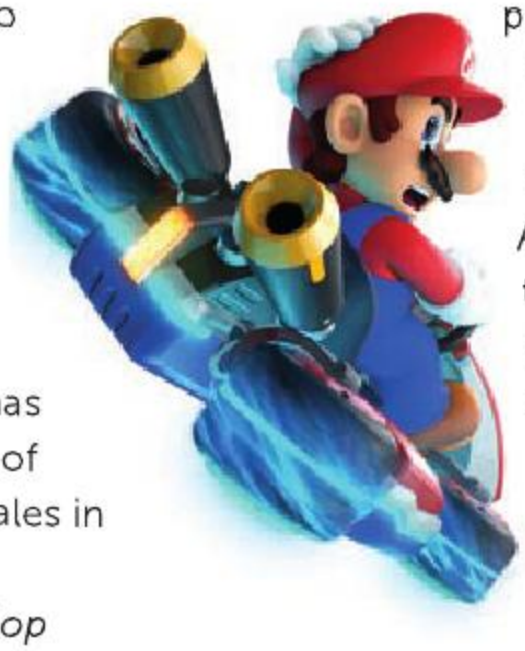
Surprised to see Nintendo in the top tier here? Well, it is a bit of a fudge: as is *Develop 100* tradition, we've put together an amalgamated entry for Nintendo, including all its Kyoto development teams in one.

This might seem like a cheat, but according to insiders this better represents the community inside Nintendo collaborating on multiple projects under one roof. It's also how the firm has historically chosen to be recognised.

Put that aside for one minute though and consider that internally-created Nintendo software has generated in excess of $1.3bn in software sales in the last year. In the context of the *Develop 100*, where the frontrunners are almost all online-centric or F2P digital games, this fact is in even sharper relief.

Is Nintendo the exception to the rule here, or does it prove something the others are missing? Well, it always did play to its own beat, so yes. But also: no.

Nintendo's unwavering focus on software for its hardware has been a core principle since the company moved into games in the mid-'80s. Anyone surprised that this offers the commercial rewards, even if they don't match previous performance or aren't in-line with industry trends, is missing the point.



Critics are always keen to point out that it relies mostly on physical sales, has been quick to move online, and caters for a dwindling audience.

But that's arguably all relative – Metacritic pegs Nintendo as one of the best performing publisher/developers in a critical sense. Nintendo's games and brands have an unrivalled respect and are cherished by millions. Plus, Nintendo is in the midst of changing to serve the audience that Supercell and GungHo have courted so well, with a recently announced widening of its offering to include apps and mobile-centric hardware – even if this strategy has only come about after prolonged shareholder lobbying.

MIXI 4

ABOUT

Country: Japan

www.mixi.co.jp

Mixi by name... and mixed fortunes by nature. A few years ago, Mixi wouldn't have even placed on the *Develop 100*, such was the once game-less internet company's potential insignificance.

Mixi was one of the first Japanese 'Web 2.0' start-ups to expand significantly, with the web services company growing significantly with a 2006 IPO and a 2008 boom. This once web-pioneer was soon upended by the ascent of Twitter, Facebook, DeNA and GREE on its hometurf. By 2012, shares were at an all time low despite numerous corporate deals and strategy changes to course-correct.

What reversed its fortunes? A game, of course. The firm's *Monster Strike*, developed with an internal team led by Konami, Capcom and Game Republic vet Yoshiki Okamoto, has lifted the firm immensely, grossing over $3m a day, and putting the firm just within game revenues' billion-dollar club. At one point *Monster Strike* was even outgrossing *Puzzle & Dragons*. And success was reportedly a viral thing at first, driven by word of mouth and only later TV ads in Japan.

It's an impressive performance once you understand the game's primary audience is in Japan, Korea and Taiwan. It was released in North America

but critics and consumers – perhaps ironically – said the game was too easy or similar to other games in this monster genre, which arguably it helped define in Japan. It's the highest placing entrant on the *Develop 100* that has such minimal international presence.

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5 BLIZZARD ENTERTAINMENT

ABOUT

Country: United States

www.blizzard.com

A few years ago, we crowned Blizzard as a *Develop 100* victor, back when the MMO worlds were unmeasured, but the gut instinct in the market was that the *World of Warcraft* firm was ahead of everyone else. It was just fresh from a merger with Activision, and *WoW*'s user numbers peaked.

Once upon a time we'd have said it was the MMO model that would serve Blizzard well in the long-term, but instead a broader commitment to its global community and continued development of its genre-fiction-style IPs is what has kept it resilient.

The studio itself knows this most of all, having struggled to replicate the *WoW* magic via the long-in-development and ultimately cancelled second *MMO Titan*, intended to establish a whole new franchise.

Instead, new spin-offs from its established series *Warcraft* and *StarCraft*, such as card game *Hearthstone*, have driven the business forward. There are now 40m registered users of the game, which was met with near-universal praise from critics, some of them the game's biggest ambassadors.

Blizzard made around $1bn from its games this year. Industry estimates – based on Activision Blizzard financials and public comments – peg *Hearthstone* at about $500m. The other half accounts for that declining *WoW* revenue base, and the growing franchises like *StarCraft* and emerging hit *Heroes of the Storm*.

RIOT GAMES 6

ABOUT

Country: United States

www.riotgames.com

To some, it's hard to believe that Riot is already nearing its first decade of business. Every now and then more casual watchers will remark that the firm – responsible for just one game, *League of Legends* – has effectively come out of nowhere in tandem with the near-sudden renewed interest in eSports.

But with 17 offices in cities around the world – Berlin, Brighton, Dublin, Hong Kong, Istanbul, Los Angeles, Mexico City, Moscow, New York, St. Louis, Santiago, São Paulo, Seoul, Shanghai, Sydney, Taipei, and Tokyo – this is clearly no flash in the pan.

Certainly, the Chinese telecoms operator behemoth Tencent doesn't think so; it acquired a majority stake the firm for over $200m – an impressive return for the investors that helped prop Riot's debut up with $15m.

League of Legends has been active for six years, and a development, production and writing staff of well over 1,000 are responsible for its upkeep, updates and upgrades.

Industry estimates put its total income at over $1.5bn – but we imagine a third of that number comes from the non-software element of the business, the tournaments Riot runs to support the game and its fanbase.

7 SMILEGATE

ABOUT

Country: Korea
www.smilegate.com

Smilegate is responsible for *Crossfire*, a Korean-born F2P PC-based FPS that a few years ago nose-tappers would tell you was the highest grossing game on the planet – only that you'd never heard of it.

Sure, that might actually have been true in 2012 when the nearly ten-year-old game started to show up on the global agenda. And certainly Smilegate had no trouble touting that claim back then.

Two years later though and the dominance of mobile has probably shaken its leadership position a little – but we reckon it's still raking in well over a billion dollars a year, and maintaining an edge on the games from closest rival Valve.

Crossfire sits in a tranche of online-facing games with patchy global coverage that nevertheless are leaders in terms of community power. It's an eSports game, a multiplayer team game, and has a huge audience – over 400m registered users apparently, with a concurrent player figure of 6m. Little of that activity comes from the West, but instead the Chinese market – although that was a challenge at first. Originally *Crossfire* was, as Smilegate's development chief Ina Jang's freely admits in interviews, as challenging as a standard shooter. That's no good for a market like China where, when the game first launched in 2008, players were new to games in general, let alone fast-paced action ones. Making the game more accessible for that market has clearly unlocked huge regards.

Jang, incidentally, is notable because her firm is the highest placed one this list with a female leader.

Smilegate has since teamed with Radiant Worlds, the new UK studio run by Philip and Andrew Oliver, for *SkySaga*.

VALVE 8

ABOUT

Country: United States

www.valvesoftware.com

No, we're not counting the 30 per cent royalty/fee Valve charges against all sales on its Steam platform – if we did the firm would undoubtedly be No.1, with billions in the bank.

But by our calculations Valve is already in the billionaires club – just about – when you solely take into account revenues made by its software.

Where does all that money come from? Mostly F2P titles, and a lot of it from China.

Most spectators will appreciate that over time the likes of *Counter-Strike, Team Fortress* and now eSports staple *DOTA2* have taken on more importance to Valve than core titles *Half-Life* and *Portal*. But what you might not know is the scale of their potential, and their popularity in other regions.

Valve, until the time of writing, has handed over the operational duties to a number of its titles to local partners – such as Perfect World and Nexon, who handle mobile versions of *DOTA2* in China and the Korean PC *DOTA 2*, respectively. Those operators have taken on sales and marketing for the games locally, although a recent dissolution of the Nexon partnership might speak to Valve looking to control the destiny of an increasingly lucrative clutch of games.

9 ROCKSTAR NORTH

ABOUT

Country: United Kingdom

www.rockstarnorth.com

The highest ranked British studio on the list, Rockstar North is currently sat happily in the long tail of *GTA V* fever.

Our eligibility period of course doesn't cover the release of the original billion-selling version on console, but it does include the newer next-gen ports, their PC cousin – and the recurring revenue from *GTA Online*.

Based on publisher parent Take-Two's financials and global retail chart data, we reckon the studio's efforts across all of those generated around $700m over the last twelve months.

Perhaps this entry is mistakenly named as 'Rockstar North', though. These days leaders at the studio see their work on *Grand Theft Auto* as a global project that uses the talents of all the teams in the Rockstar empire, from North America to Europe. These days, multi-site cross-team projects aren't uncommon amongst the big budget console games. But if you're looking to understand why the teams here generally do so much better than comparable efforts – at, say, Ubisoft – perhaps the defining element is Rockstar's scrupulous focus on quality. It is also never afraid to delay a release or retool content as it aims for the highest of production values.

TRAVELLER'S TALES 10

ABOUT

Country: United Kingdom

www.ttgames.com

Rockstar North may just pip it on revenues, but arguably Traveller's Tales/TT Games is the true UK games expert leader. It's certainly the most prolific of British software houses – for the past five years it has produced on average four games a year based on original Lego properties or licences owned by the toy firm.

No wonder, then, that the firm has made an estimated $650m in global game revenues for itself and parent Warner Bros.

When the *Develop 100* was based on UK retail data only, TT Games would always proudly sit in or just outside the Top 10, happily contrasting with the core gamer crowd. We were a little surprised when our calculations for a wider, more global and more platform-inclusive list still had the Britsoft icon riding high – but that's a testament to the strength of the games it produces, their brand power, and enduring affections amongst players of all ages.

And there's no doubt that TT's most recent release, toys-to-life title *Lego Dimensions* – not counted for revenue here given its September release date – will propel the studio further up the listings next year.

11 NEOPLE

ABOUT

Country: Korea
www.neople.co.kr

So let's get the first thing out the way – it's a portmanteau. 'Neople' stands for Neo + People and Neo + Pleasure, summing up this studio's attitude to keeping staff happy, and pleasing its community.

Starting out an independent but becoming a Nexon internal team via acquisition in 2008, the team is responsible for *Dungeon & Fighter/Dungeon Fighter Online*. *D&F* debuted in 2005 but, after years of updates, it is now Nexon's most lucrative game, outstripping tentpoles like *MapleStory*. The game was predominantly Asia-facing and technically didn't have a European presence until a 'global' relaunch of the game in March 2015.

12 KING STOCKHOLM

ABOUT

Country: Sweden
www.king.se

This is one of four King Digital studios on this list and the star performer in the social-casual giant's portfolio.

King Stockholm devised *Candy Crush Saga* and its *Soda Saga* follow-up, the tentpoles in the King empire. Soon, after the multi-billion move by Activision Blizzard to acquire the firm, it will be part of a bigger stable that includes *Call of Duty*'s stewards Sledgehammer and Treyarch and many others.

Our estimates put this team just ahead of Activision's, with $600m in revenue from the *Candy Crush* games. Critics say the shine has come off King's games, but its massive audience suggests the saga isn't over yet.

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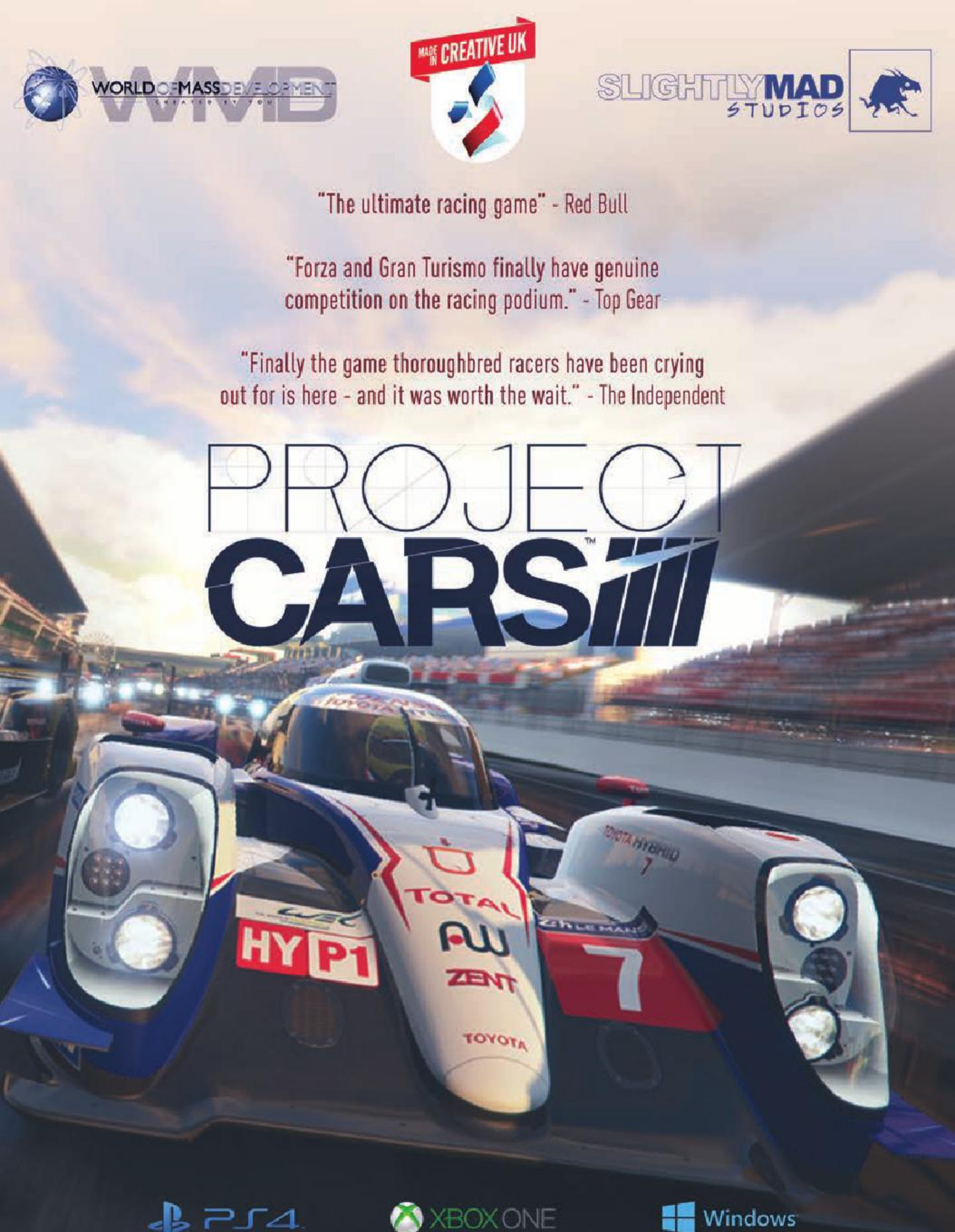

PS4 XBOX ONE Windows

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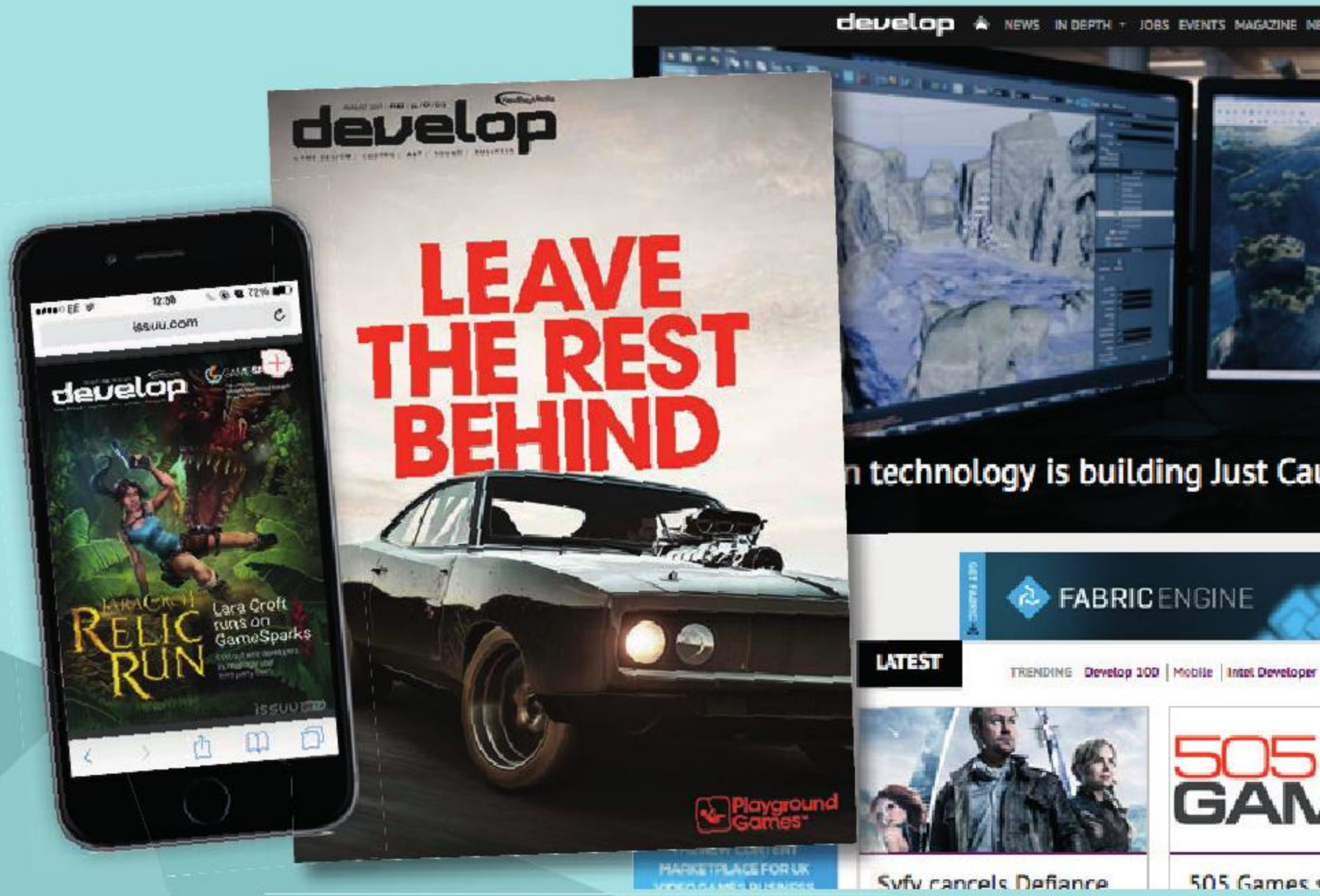

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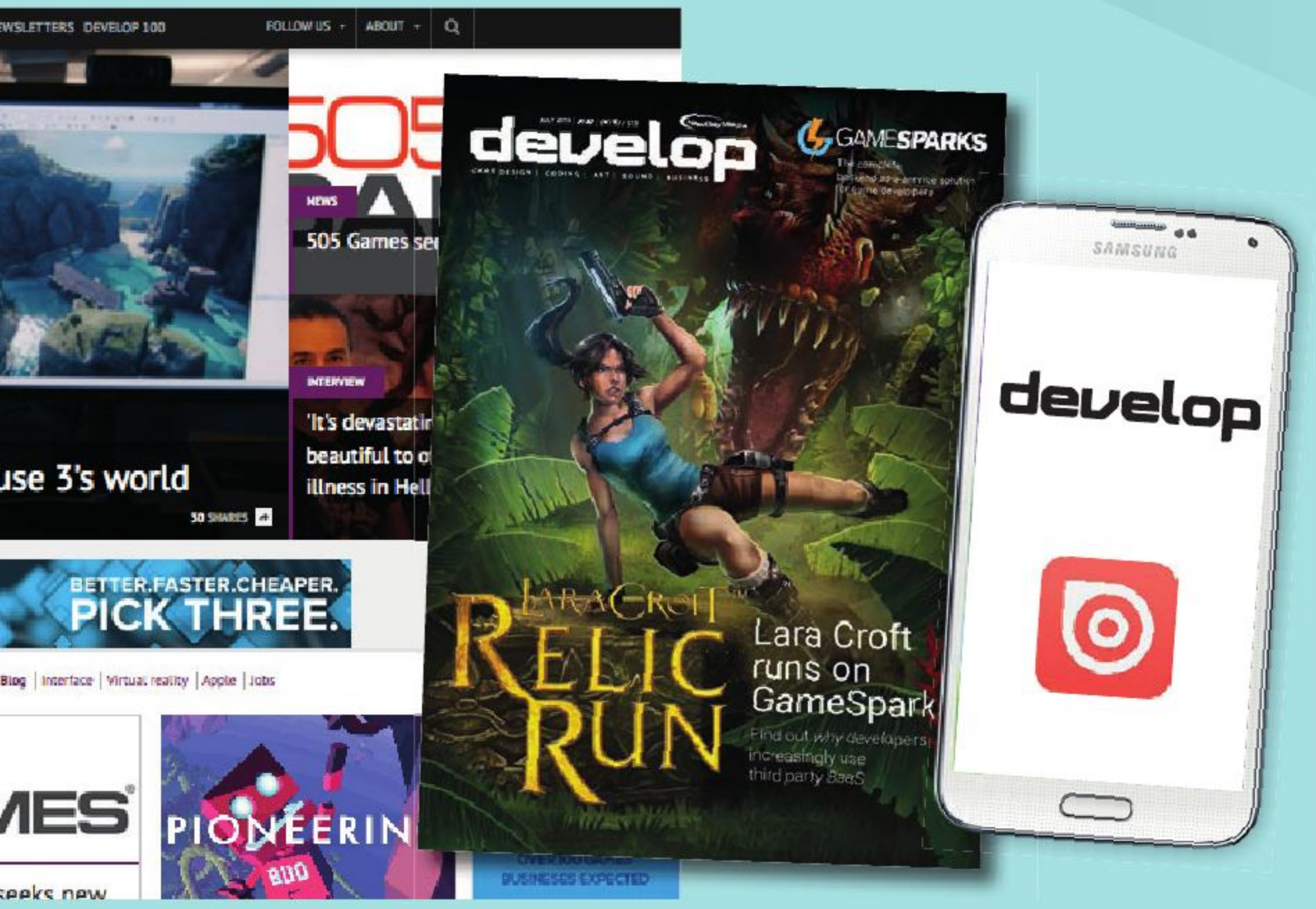

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13 SLEDGEHAMMER GAMES/TREYARCH

ABOUT

Country: United States

www.sledgehammergames.com
www.treyarch.com

So yes, we think the *Candy Crush* franchise may be worth a few dollars more than *Call of Duty*, hence that being placed at No.12.

But new sister studios Sledgehammer and Treyarch shouldn't be too put out. *Call of Duty* is still a behemoth, even if pundits are right and the numbers dipped over the software generation transition.

The games, which operate on two-yearly cycles – now a three-yearly cycle – currently between *Advanced Warfare* and *Black Ops*, likely brought in around $400m from the main game (*Advanced Warfare*) and its DLC and another $100m+ from back catalogue.

14 MACHINE ZONE

ABOUT

Country: United States

www.machinezone.com

There are two clear, rounded and well-supported reasons that Machine Zone and its *Game of War*, er, game ride so high in the charts. And that's iOS and Android. One curious fact we came across during our research was the claim that the two different mobile platforms make a balanced just-under-$1m per day for the studio, with total revenues around $585m for the year. Plus, marketing: the firm has used Kate Upton and now Mariah Carey to lead the TV and display ads. And it's not been shy about exploiting the pair's, shall we say, physical assets to lead the charge. The only tits are the pundits who say that kind of strategy doesn't work.

EA CANADA 15

ABOUT

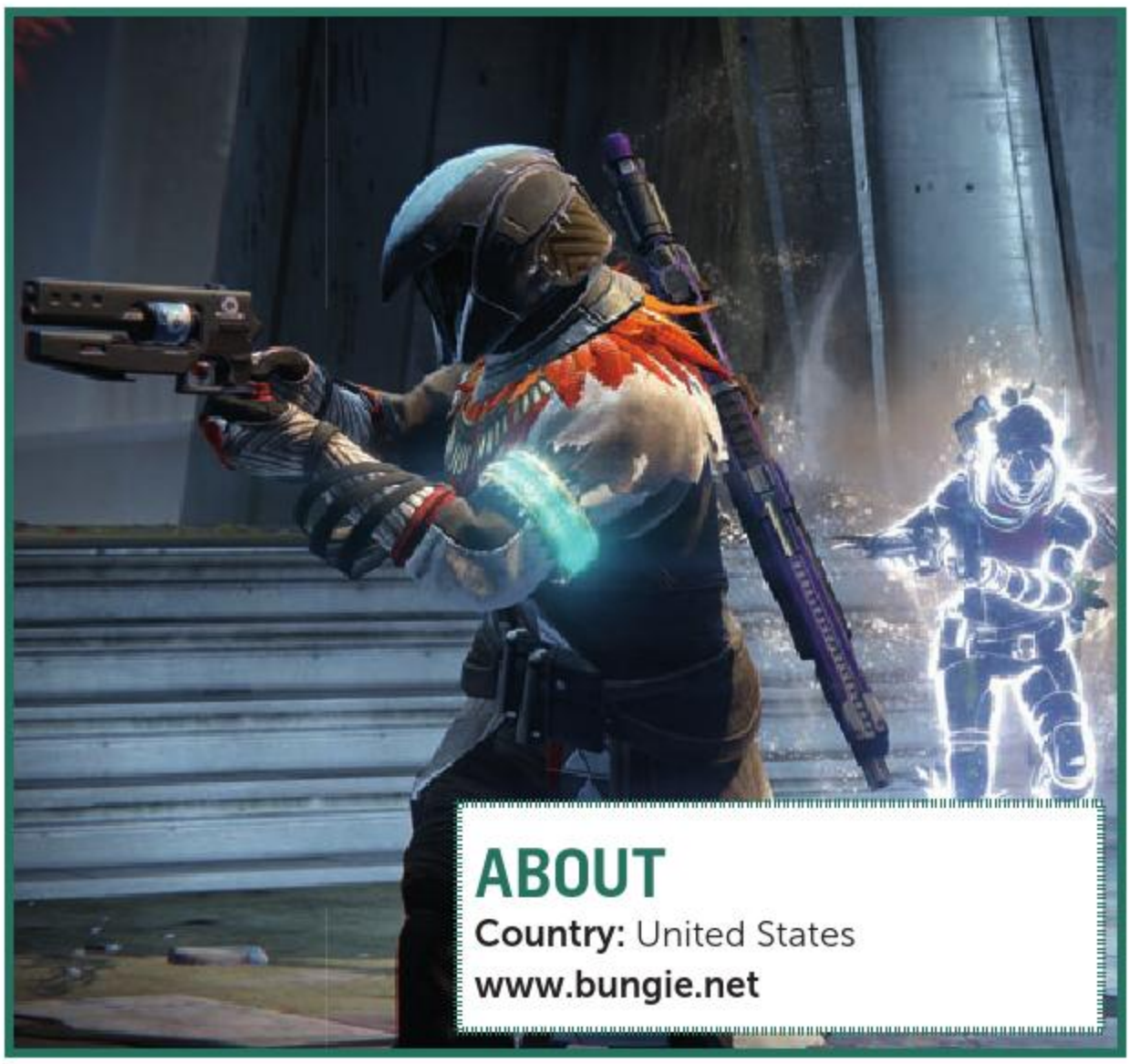
Country: Canada

www.ea.com/ca

Once upon a time, EA Canada was top dog in the *Develop 100*. Which made sense when the list was based on UK retail sales because *FIFA* was – and still is – the star striker in stores.

In a wider, global context with mobile and PC, it's still a premier league studio, the Vancouver-based team will be happy to hear. Even better: this methodology better recognises the performance of the *FIFA* franchise, which left behind being just a disc game long ago. The *FIFA* games generate c.$550m for EA, thanks to the yearly update, Ultimate Team, and now the FIFA Ultimate Team mobile game, which is said to be making $40m a year.

BUNGIE 16



ABOUT

Country: United States

www.bungie.net

A solid debut for *Halo*'s spiritual successor *Destiny* puts Bungie as one of the leading console developers on this list.

Industry estimates and the financials of its publisher suggest *Destiny* is already half way to achieving Bungie and Activision's aim of making a billion dollar franchise. Although it should be said that the conventional wisdom is that Activision was possibly hoping for a bigger hit out of the gate.

That doesn't really matter now, as the community for this game has really grown and expanded, creating plenty of potential for Bungie's future and its ten-year plan for *Destiny*.

17 UBISOFT MONTREAL

ABOUT

Country: Canada
montreal.ubisoft.com

The varied teams at the Quebec superstudio produced a mix of 2014 and 2015 games including blockbuster *Assassin's Creed Unity* and *Far Cry 4,* plus gamer-focused fitness title *Shape Up*.

The bulk of revenues come from the first two games, and a critical drubbing for *Unity* meant that *Far Cry 4* was the game that picked up the slack. European chart data shows a longer tail of sales for that game than the *Assassin's Creed* sequel.

The Montreal-based studio is currently developing the much-delayed but still hotly anticipated *Tom Clancy's Rainbow Six: Siege*.

18 WARGAMING

ABOUT

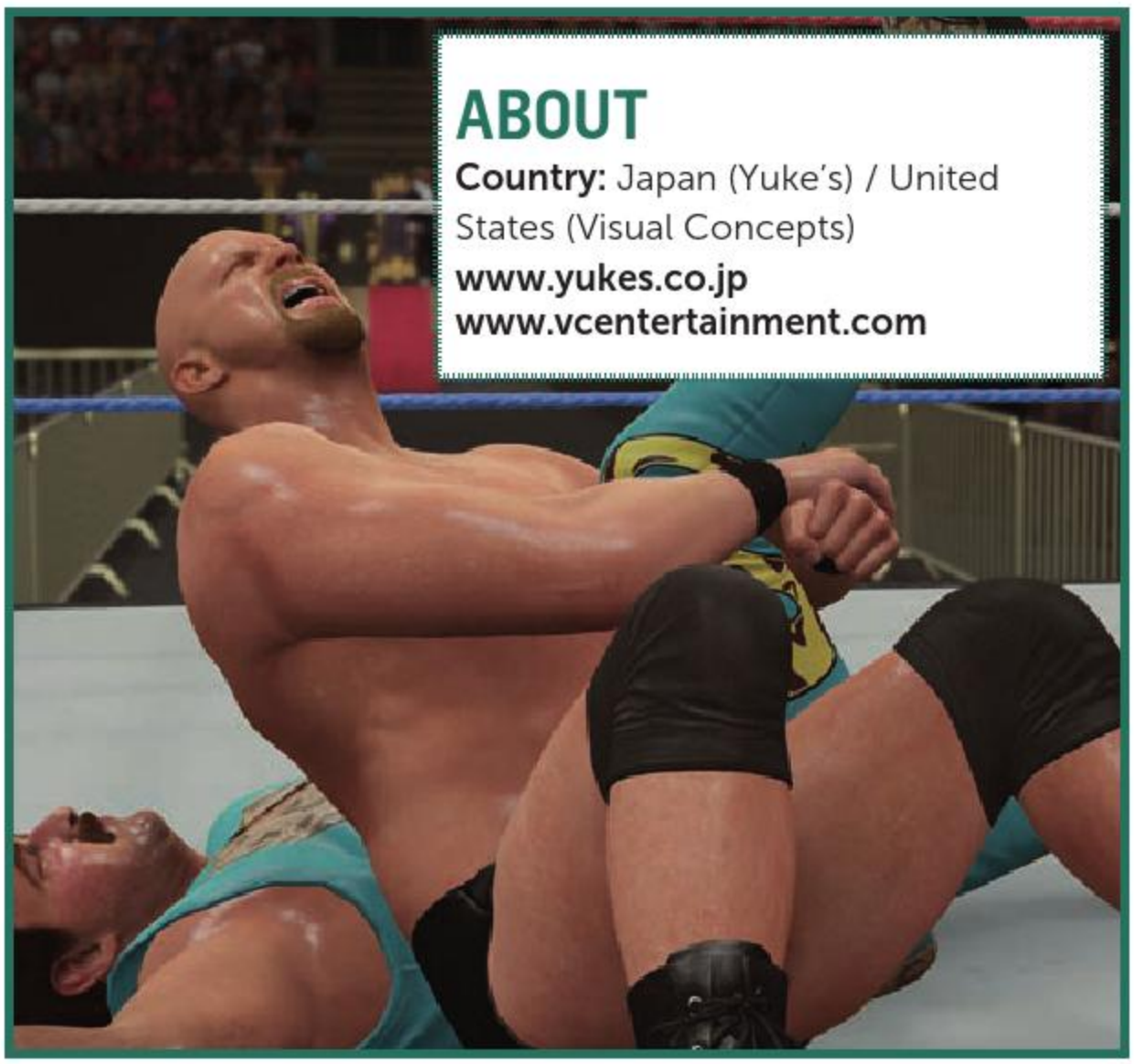
Country: Russia
www.wargaming.net

We've got a relatively conservative revenue estimate here of around $450m for the Russia-based but increasingly global war games firm.

Two years ago, industry estimates pegged the firm at $350m from games like *World of Tanks*, and the addition of new territories, mobile spin-offs and Asian game operator deals will have only boosted the coffers.

Certainly, Wargaming is making all the moves a cash-happy developer/publisher would do, opening things like a publishing label and partnerships to support vanity-level deals, such as reviving old franchise *Master of Orion*.

YUKE'S/VISUAL CONCEPTS 19



ABOUT

Country: Japan (Yuke's) / United States (Visual Concepts)

www.yukes.co.jp
www.vcentertainment.com

A shared entry for the teams that bring 2K's WWE and NBA tie-ins to market every year.

Yuke's is no stranger to the *Develop 100*, having been a regular contender when the *WWE* games were handled by THQ. But there has been a change since the franchise changed publisher hands. Specifically, the inclusion of Visual Concepts as co-developer to help make the leap to PS4 and Xbox One.

Between them, we estimate total revenue of $400m; $150m from the *WWE* games, $250m from *NBA* which performs well both on console digital/physical and mobile – about 10 per cent of the franchise's revenues.

SORA 20

ABOUT

Country: Japan

www.smashbros.com

We've calculated a relatively conservative revenue number for the developer of *Super Smash Bros* on Wii U and DS. Although Nintendo has said over 10m copies of the game have been sold across both formats, it's not clear how much dual-ownership there is.

So we're putting it in at just under $400m. Even if the money is undervalued, the studio itself should not be – this latest *Smash Bros* was on of the most acclaimed games on Metacritic last year, helping Nintendo claim the No.1 publisher ranking on that site.

Sora was reportedly dissolved in 2012, with Namco Bandai co-developing its final game.

21 GAME FREAK

ABOUT

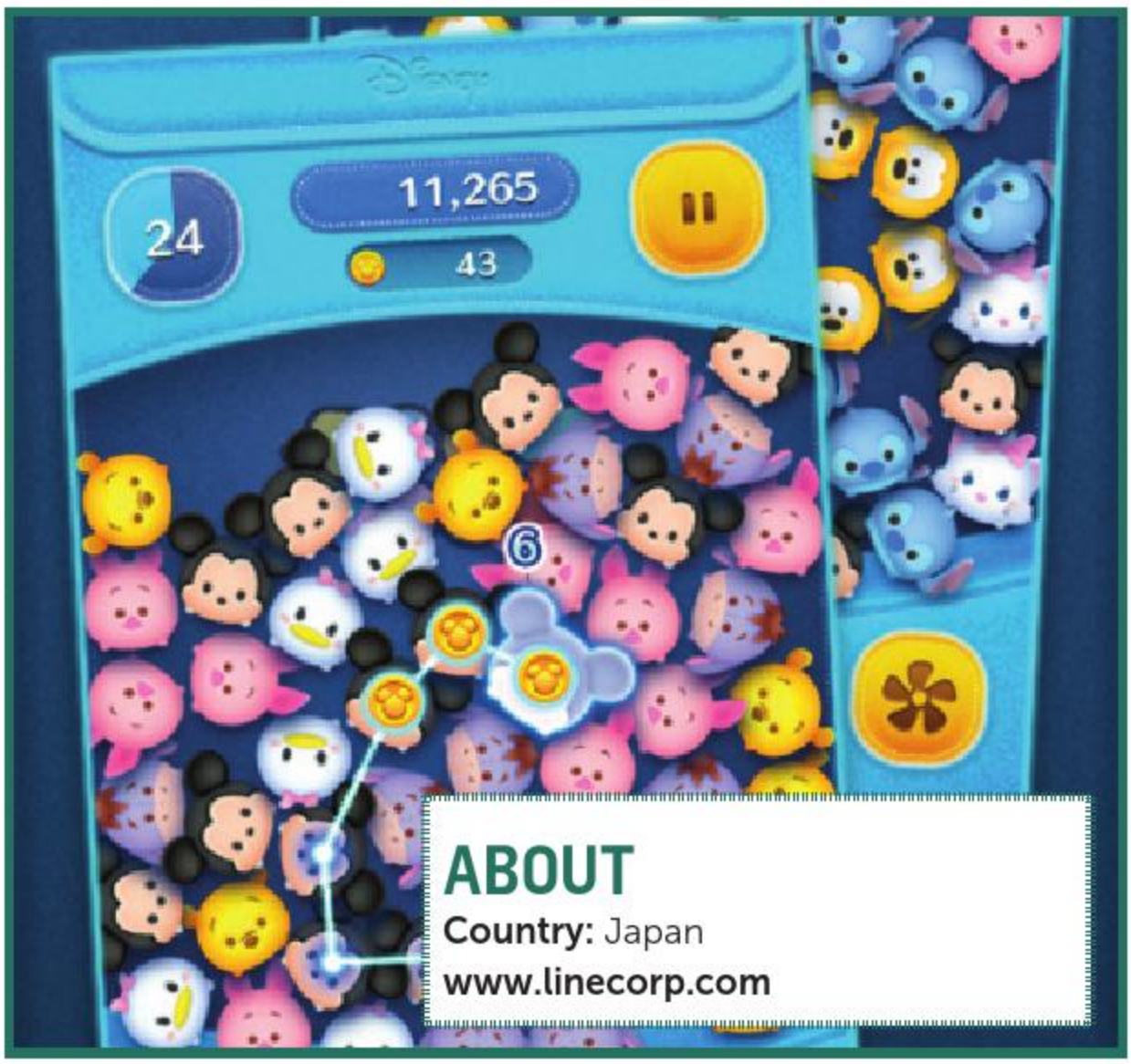
Country: Japan

www.gamefreak.co.jp

It's easy to be sniffy about *Pokémon*. Like it's eponymous collectable monsters, the various iterations only seem to evolve incrementally and the core of this franchise's gameplay has remained unchanged over the last twenty years.

But maybe that's a good thing as the games' total revenue for the last year was around $390m. That's just software – *Pokémon* is still a licensing juggernaut, and every dollar earned underlines why parent firm Nintendo, which allows the brand to be run as a partly independent entity, grants it so much autonomy.

22 LINE CORPORATION



ABOUT

Country: Japan

www.linecorp.com

LINE Corporation is a Japanese subsidiary of Korean internet search firm Naver and best known for its Skype-like calls and messaging service.

It added games within its service some time ago, but where it really hit big lately was a partnership with Disney for its *Tsum Tsum* game.

Although designed to promote a new wave of cutesy toys specifically made for the Japanese market, and built with an accordingly low difficulty level, the game has been a bit of a global stealth hit through in-app purchases. The title has generated nearly $400m according to figures from Disney itself.

NEXON 23

ABOUT

Country: Japan

www.nexon.net

So while internal *Dungeon & Fighter* studio Neople is way ahead at No.11, the rest of Nexon's internal teams – responsible for *MapleStory* and other internally produced video games – put up a good fight here.

What isn't included in this entry is the various revenues Nexon will make from other games that it doesn't actually develop, such as *Counter-Strike* which sits with Valve – but it's worth remembering that this is still a big part of the studio's business and the firm admits it has applied lessons learned from its portfolio to different titles across the board.

EA TIBURON 24

ABOUT

Country: United States

www.ea.com/locations/orlando

Once upon a time, executives at publisher Electronic Arts would give us a fair amount of grief about the *Develop 100*.

When it was based solely on revenue generated within the UK, Tiburon and its *Madden* and *NFL* series of games wouldn't get a look in given the relative unpopularity of American Football in the UK – and EA Canada's *FIFA* success stirred up friendly inter-team rivalry.

Now, in a global setting this list isn't going to help that team competition. Tiburon is now clearly one of the world's Top 25 studios – just don't let the team see who made it to No.15.

25 BIG FISH GAMES

ABOUT

Country: United States

www.bigfishgames.com

With a wide portfolio of games – encompassing everything from hidden object to match-three titles – there's no single standout product that accounts for what must be around $300m in revenues a year generated by Big Fish Games.

Now, while we've ignored a lot of pure gambling or gambling-like apps that clog up the various app stores out there when compiling this list, it's worth noting that Big Fish Games is heading deeper into this territory. The company was acquired at a valuation of $885m a year ago by casino and racetrack firm Churchill Downs.

26 TOYS FOR BOB / VICARIOUS VISIONS / BEENOX

ABOUT

Country: United States (Toys For Bob, Vicarious Visions) / Canada (Beenox)

www.toysforbob.com
www.vvisions.com
www.beenox.com

This is a three-pronged entry for the cluster of studios that between them are in charge of another billion-dollar Activision franchise: *Skylanders*.

However, it must be noted, we've only gone for software revenue, not the money made from sales of the toys required to play the game. This would no doubt propel them much further up the list.

Even without the combined figure of games and toys, $275m from just the software is not to be rubbished, even if the *Skylanders* franchise has faced both decreasing consumer interest and stiff competition from *Disney Infinity* and now *Lego Dimensions*, too.

ZYNGA SAN FRANCISCO 27

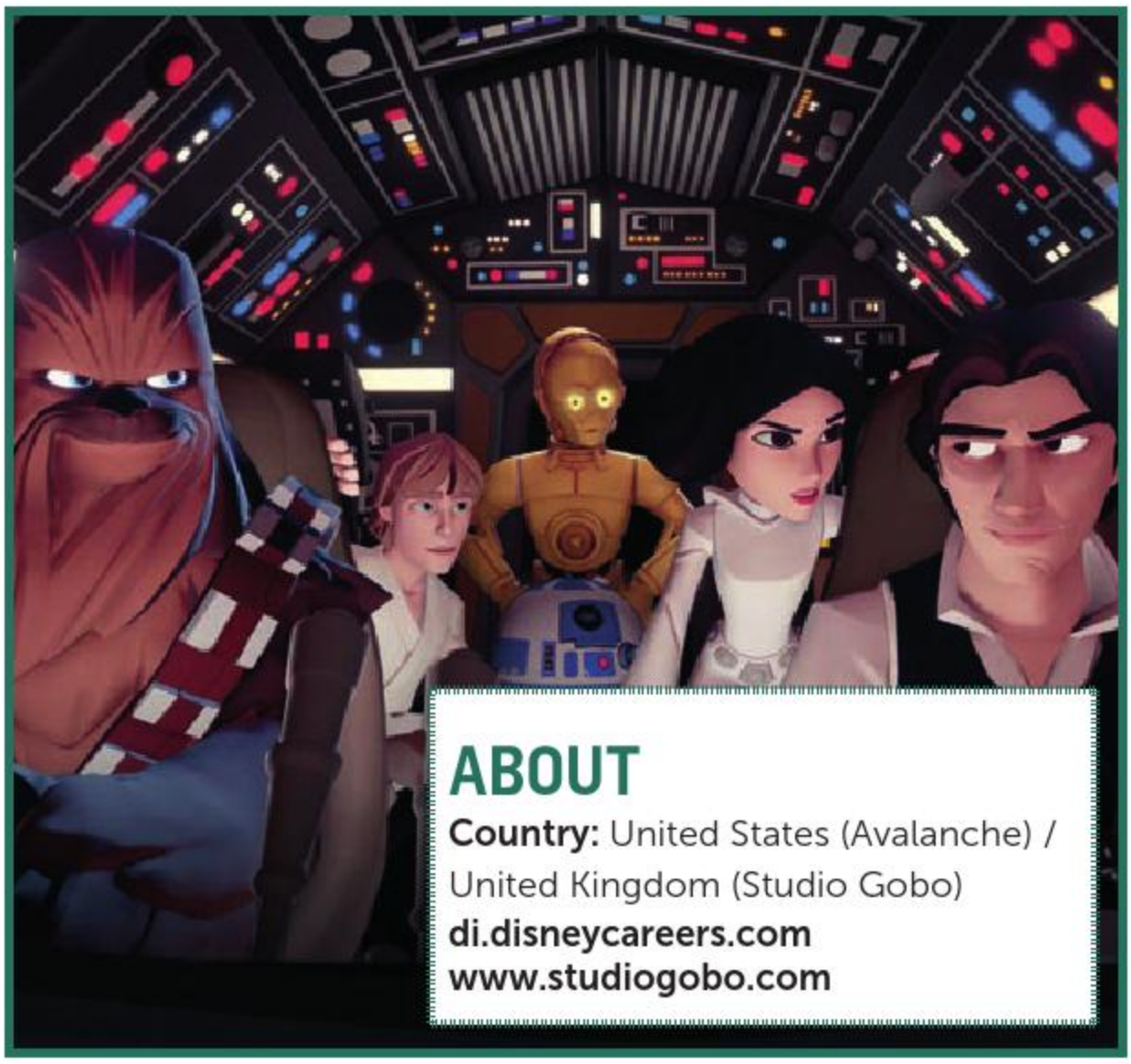
ABOUT

Country: United States
www.zynga.com

It's not been an easy ride for Zynga at a corporate level. Once the ambitious king of the fast-moving social games market, over-expansion and management upheaval has redrawn the firm's priorities.

But the San Francisco development teams at the HQ have been a huge part of the restructuring as it scales back some projects, pushes further into mid-core social games on mobile, and looks to further exploit the poke/gambling genres. While familiar brands like FarmVille are still positioned front and centre in the firm's offering, hopes are also high for new IP such as NaturalMotion's *Dawn of Titans*.

AVALANCHE SOFTWARE / STUDIO GOBO 28



ABOUT

Country: United States (Avalanche) / United Kingdom (Studio Gobo)
di.disneycareers.com
www.studiogobo.com

Disney Infinity has been an overwhelming success for Disney Interactive, having eaten into the *Skylanders* empire over the last two years.

The series has diverted shelf space, consumers and revenues to its own toys-to-life game which, while primarily built by Avalanche Software, uses studios like Studio Gobo to finish add-on Play Sets.

Industry estimates still put it a step or two behind the *Skylanders* powerhouse for now, although the recent addition of *Star Wars* characters, plus ongoing appearances from the Marvel universe, will no doubt change that next year.

29 GAMELOFT

ABOUT

Country: France

www.gameloft.com

Gameloft is a bit squirrelly when it comes to studio attribution. Although it has offices around the world, it isn't especially clear which games are made in each region.

That's likely not driven by any nefarious motive, but instead purely down to the sharing of resources between teams. That said, it's a mite ironic given its spiritual cousin Ubisoft – the two firms' CEOs are brothers – is the most upfront when it comes to crediting studios individually for their work.

So we've got the whole studio network in here, making around $250m a year from a mixture of free-to-play and premium mobile games.

30 GOODGAME STUDIOS

ABOUT

Country: Germany

www.goodgamestudios.com

German mobile and browser game expert Goodgame Studios has slowly but surely become one of the country's biggest developers with its portfolio of games. And with approximately $215m in revenue from its titles you can see why.

Although privately owned, the firm publicly puts out revenue statements, helping prove the point that you don't need to be an Asian powerhouse or Silicon Valley darling to conquer online and mobile games.

It has been growing it team as well as its games offering, last year hiring its 1,000th employee.

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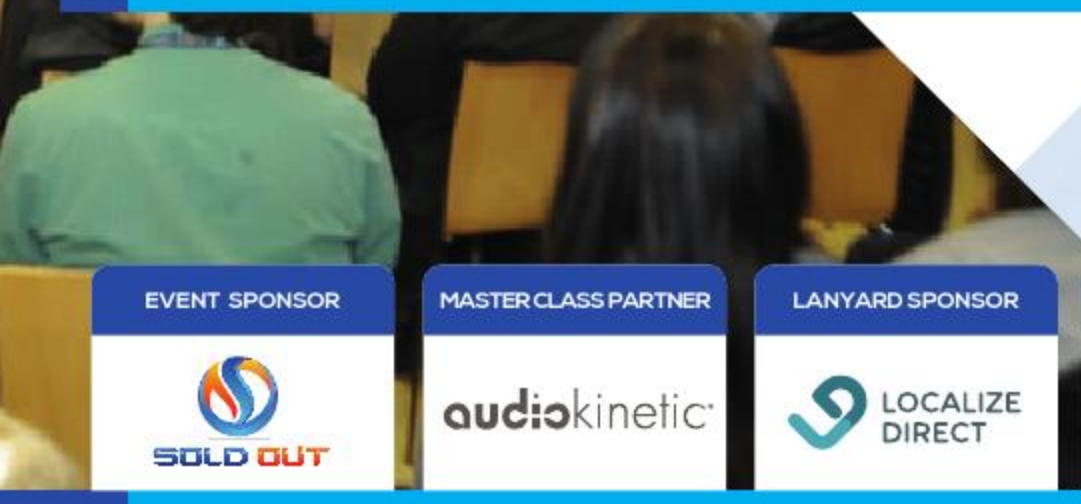

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CHARLOTTE NANGLE OR **JENNIE LANE** ON **01992 535647**
EMAIL **CNANGLE@NBMEDIA.COM** OR **JLANE@NBMEDIA.COM**

31 CD PROJEKT RED

ABOUT

Country: Poland
www.cdprojektred.com

The Witcher III: Wild Hunt has been a big business driver for CD Projekt – which, don't forget, also owns digital distribution platform GoG.com.

The acclaimed RPG has made around $200m after just four months on the market. Around a quarter of its sales and users are on Steam, with the rest of the revenue split between console sales in Europe and the rest of the world.

The game was also a critical hit as well, with an average of 92 on Metacritic, proving CD Projekt's decision to delay the long-in-development title was worth it. Attention now turns to the long-awaited *Cyberpunk 2077*.

32 MOJANG/4J STUDIOS

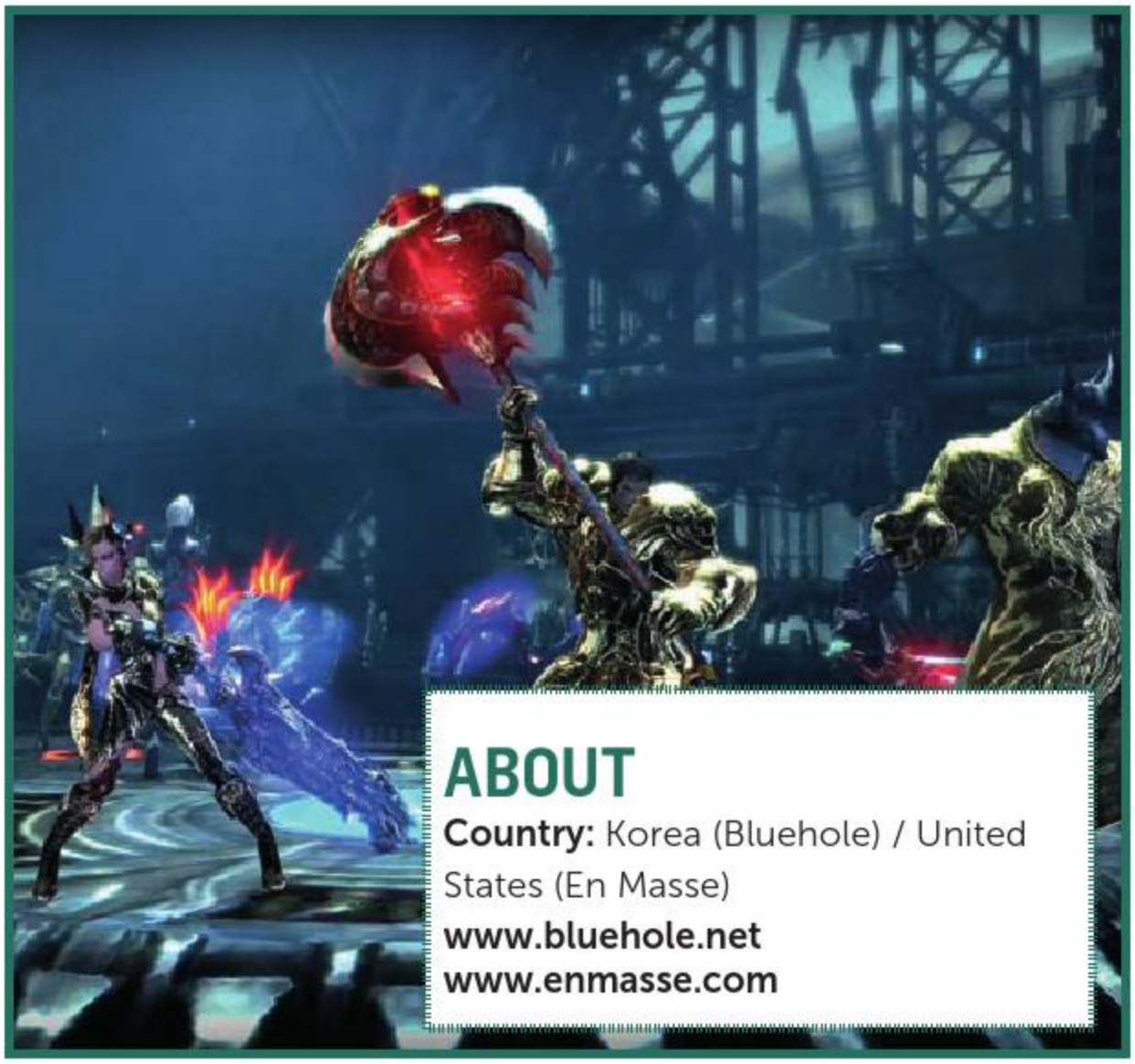
ABOUT

Country: Sweden (Mojang) / Scotland (4J Studios)
www.mojang.com
www.4jstudios.com

Perhaps a surprisingly low position for the domineering kids game, but we're only taking software revenues into account. Our estimate pegs sales at something nearing $200m.

A good chunk of the credit goes to Scottish outfit 4J for creating the console ports, hence the shared entry. If you're looking for the wider value of *Minecraft* in general, to both new owner Microsoft and its partners, it's likely at least five times the software revenue once you take merchandising, events, other licensing plus incremental revenue – such as advertising cash the series has made for YouTubers – into account.

BLUEHOLE / EN MASSE 33



ABOUT

Country: Korea (Bluehole) / United States (En Masse)

www.bluehole.net

www.enmasse.com

North American games firm En Masse Entertainment and its Korean parent Bluehole produce and publish a number of MMOs. The biggest of these is its internally-made *Tera* which, while having seen some decline in recent years, is still one of the top five MMOs on the planet.

Revenue estimates hover somewhere between $180m and $200m for that game alone – it should be noted we've focused on the games En Masse has made directly, not published or operates.

The firm recently moved into mobile, although results so far seem to be mixed, meaning *Tera* remains vital to its success.

SQUARE ENIX STUDIOS JAPAN 34

ABOUT

Country: Japan

www.square-enix.com

It's been a relatively quiet time for Square Enix's homeland games development teams.

In fact it's been a quiet time for the company in general, which almost went a year without a major triple-A game, and instead focused on MMO and mobile offerings at home and abroad.

That's what has buoyed the studio up to a relatively high position this year with income from games like its *Final Fantasy XIV* MMO and its now vast stable of mobile titles seemingly healthy. The latter – a mix of new IP and *Final Fantasy* remakes – often bear premium price tags, helping to drive the studio's revenues.

35 MONOLITH PRODUCTIONS

ABOUT

Country: United States

www.lith.com

In *Middle-Earth: Shadow of Mordor*, Monolith delivered the surprise hit of 2014. Few were expecting good things of what on paper sounds like yet another *Lord of the Rings* spin-off to deliver, but it was a critical smash which in turn led to strong sales of over $180m.

The game was only released on next-gen consoles, a potential gamble but in hindsight nothing to worry about. Key to the game's strength was the Nemesis system, an in-game mechanic that helped focus on the villains of Tolkien's Middle-Earth, and most importantly add some fresh material to the otherwise exhausted lore.

36 STORM8 STUDIOS

ABOUT

Country: United States

www.storm8.com

The Californian social games studio places so highly as our data shows it has twelve games in the Top Grossing mobile games chart of September 2014 to August 2015.

And while a cynic might once-over their list of games – including *Candy Blast Mania, Jewel Mania, Bubble Mania, Farm Story*, and more – and brand them as yet another 'me too' developer, it's worth knowing also that it has key relationships as a Hasbro licensee for a *Monopoly Bingo* title.

So it won't surprise you to hear that it's exec rank now include Zynga defectors and other social experts.

343 INDUSTRIES 37

ABOUT

Country: United States

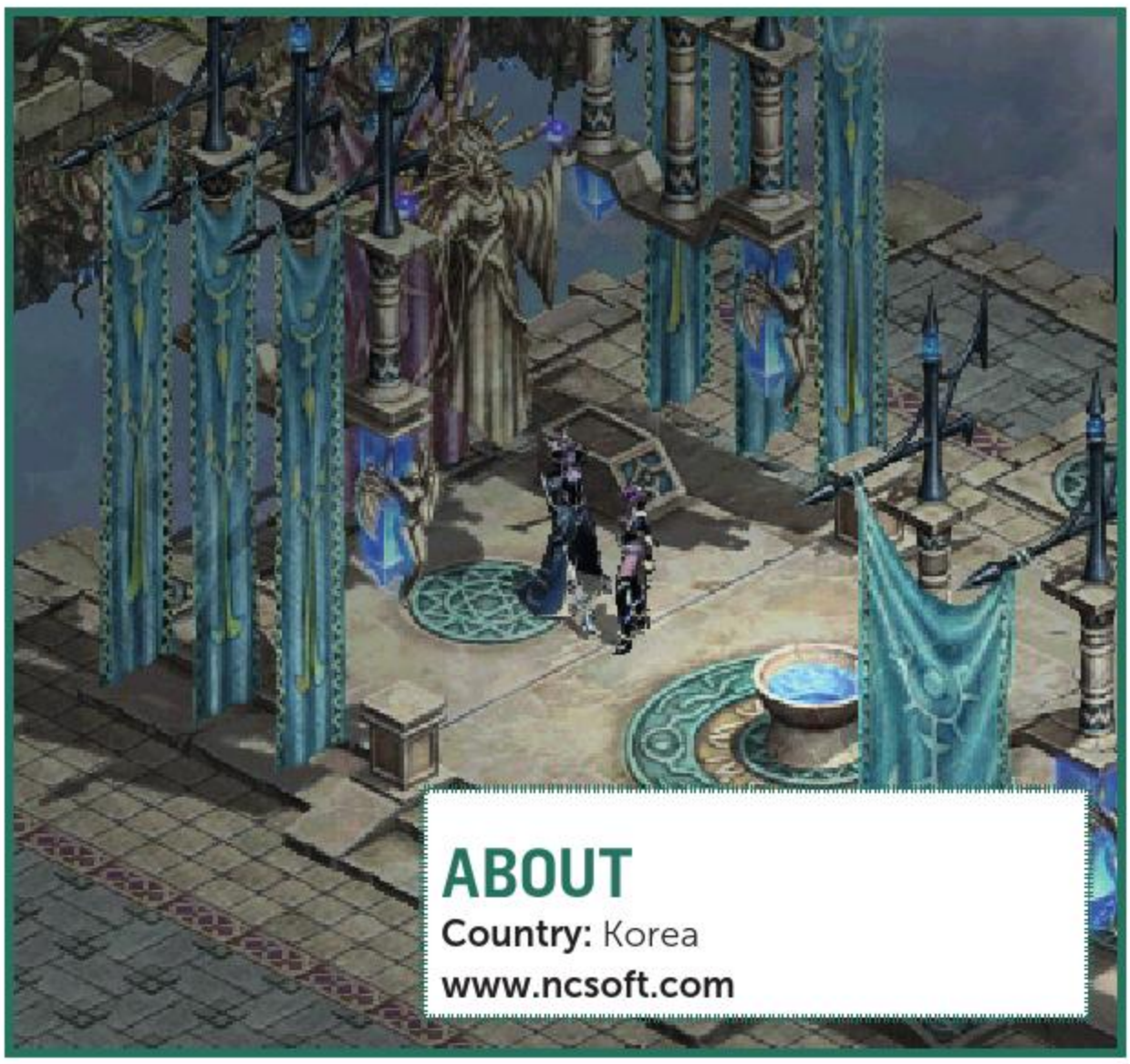
www.343industries.org

Although it was beset by launch problems, 343's 'HD remaster' of the first four *Halo* games still made an impressive amount of money.

All the more pleasing to know when you remember much of the content was pre-existing and reformatted for Xbox One. *The Master Chief Collection* was a good stepping-in point for anyone new to the series, and once updated a decent showcase of the Xbox One's capabilities.

The recently released fifth entry in the main series, *Halo 5: Guardians*, should ensure the studio rides high next year, too, with more adventures for Master Chief planned in future.

NCSOFT 38



ABOUT

Country: Korea

www.ncsoft.com

The data cruncher inside *Develop 100* would gladly put NCsoft straight in at No.1. They show an unrivalled level of transparency in terms of revenues per game. This entry is for NCsoft's main internal studios, responsible for *Lineage* – we've split ArenaNet and Carbine out separately at No.55 and No.73 respectively.

Lineage is still the big money spinner for the firm – the MMO is actually 17 years old, and made around $160m over the last year. 66 per cent of the total NCsoft player base is in Korea and half of its global audience is playing *Lineage* – and few, it turns out, seem to have upgraded to *Lineage II*.

Testronic Laboratories: Back-Stage Support For Your Starring Game

Here at Testronic Laboratories we're aware that QA and localisation services probably don't represent the glamorous face of the games development business.

But while we may not be the stars of the creative process, we pride ourselves on the fact that our services are an integral part of the development process. We're the backstage department supporting Dame Judi Dench, or the road crew for The Rolling Stones, if you like. And like the roadie ensuring that Jagger's vocals aren't drowned out by Keith Richards' guitar rifts, our role is to ensure that the consumer's experience is as near-perfect as it can be, on behalf of the stars of the business – the games development geniuses.

QA in games development has never been more important. User expectation is high and in this age of social media, no one can afford to release poor quality content and not have it noticed. Some may say that there is no such thing as bad publicity, but we prefer it if the stars that we support don't end up with their screenshots being used as mugshots.

With over 15 years of providing QA, compliance, functionality, compatibility and localisation services (we've been around since Warcraft became a World, as we like to point out), it's no surprise that the biggest studios around the world – many of whom have been recognised for their achievements in this Develop 100 publication – use Testronic Labs as their QA vendor of choice.

Testronic

Localisation by Testronic Labs

Gaming is an international language. Making sure you're a hit in new markets means more money, bigger franchises and big wins for brand awareness. Localisation is key. And we can help make sure you never say console, when you meant to say console.

With our global reach of languages, we're ready to support you wherever in the world you're headed. We can give you localisation testing for in-game audio and text, terminology and error message passes on specified platforms as well as proofing for pack, manuals and websites - and deliver it in a finished package, ready to go.

We've got the experience and resources to handle whatever size project you have. From the sheer bulk of an MMO to the quick turnaround of a casual game, we're on it. We cover 37 different languages; we are working to make that 38 with the addition of Klingon but native speakers are proving a little difficult to source at the moment.

Functionality QA by Testronic Labs

All games aren't created equal. But we think that all games should be treated equally. As an independent test centre, you get nothing but objective, in-depth feedback from us so you can ensure all your original expectations are met.

We start by understanding what you need and what matters most to you. We then evaluate your reference build and original design documents. Then, through a mix of Scripted and Exploratory testing, we'll give a test plan and approach that is specifically created to fit the needs of each title.

We put your game through a scripted ringer, so your customers don't put you through one on the forums. You get a detailed test of every aspect of the title, which means that from play-through and in-game sequences to more technical elements like user configuration, stats, scores, collision detection and the full range of graphic components, you can be confident that the title works just the way you intended it. And because we give you a personalized testing plan, you can track and reproduce the test cycle with detailed metrics all along the way.

To help you get a fix on those off-the-radar issues, our expert QA teams will also do Exploratory Testing so you can find and fix unexpected problems before you go to market. Console, PC, online, handheld, or mobile, your customers need a game that works perfectly and then you become the star of the show.
We can help make sure you give them that.

39 CAPCOM

ABOUT

Country: Japan

www.capcom.com

Like a number of the once-giant Japanese games publishers, Capcom has had a quiet time of it lately on the global stage.

In fact, overall revenue this year hit its lowest point since 2004. We reckon, though, games available developed by its internal production studios were still pulling in around $150m of total revenue in the last 12 months.

The company has recently undergone a restructure to compensate for the lower income, but is now ramping up again as it prepares a new entry in the *Street Fighter series* and key re-releases for the market.

40 BIOWARE

ABOUT

Country: Canada

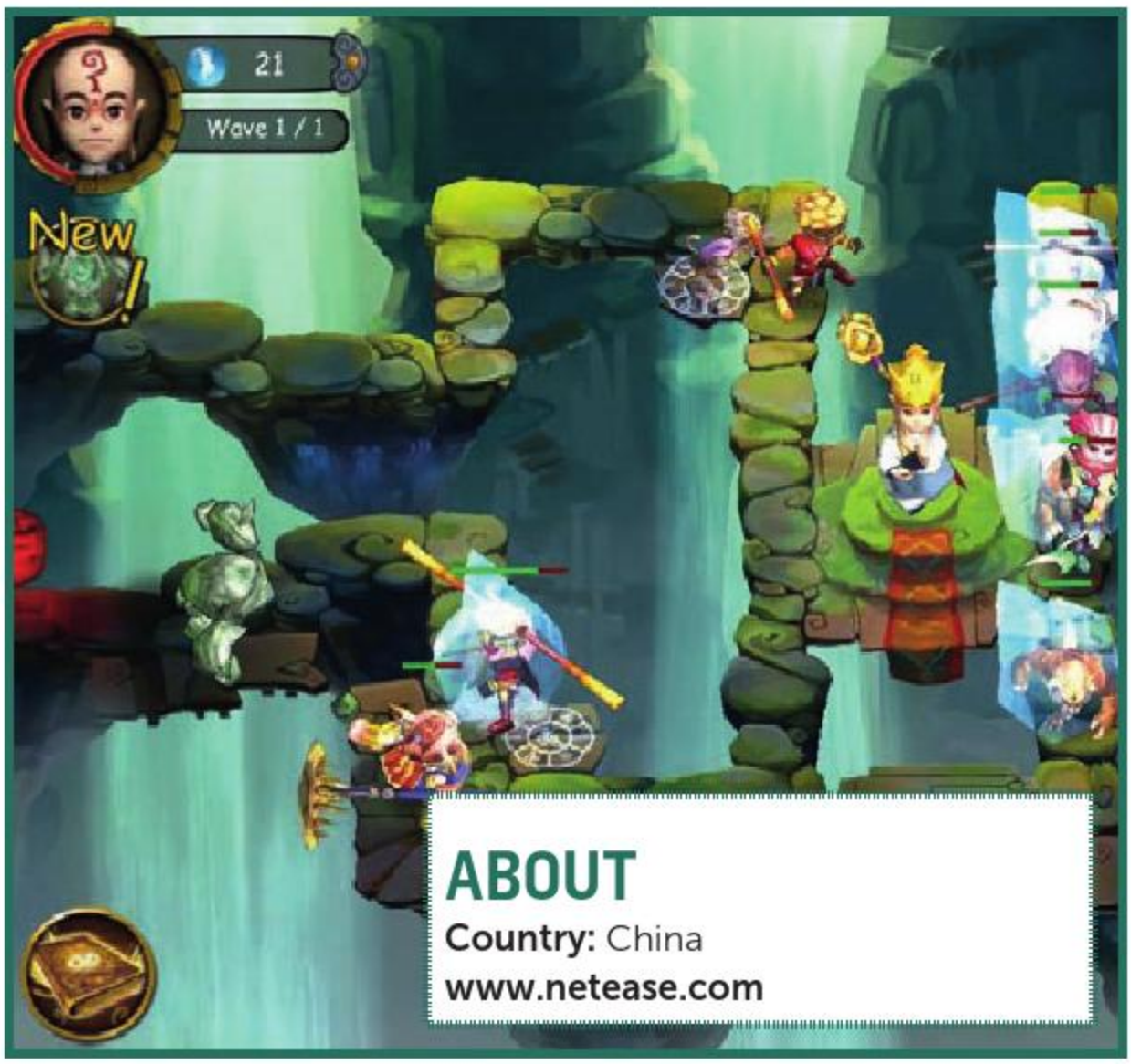
www.bioware.com

Despite the presumed decline of *Star Wars: The Old Republic* in the last year, and then paired with the so-so sales performance of *Dragon Age III*, BioWare remains one of core gaming's most beloved studios.

Even in the face of controversial writing or corporate rejigging – the BioWare map has been redrawn numerous times as studios close and leaders leave – the RPG experts have a truly engaged audience.

Most of them are waiting for one thing: the next *Mass Effect* title *Andromeda*. The studio isn't going to leave the once-finished trilogy alone, announcing a new series was in the offing during E3 2015.

NETEASE 41



ABOUT

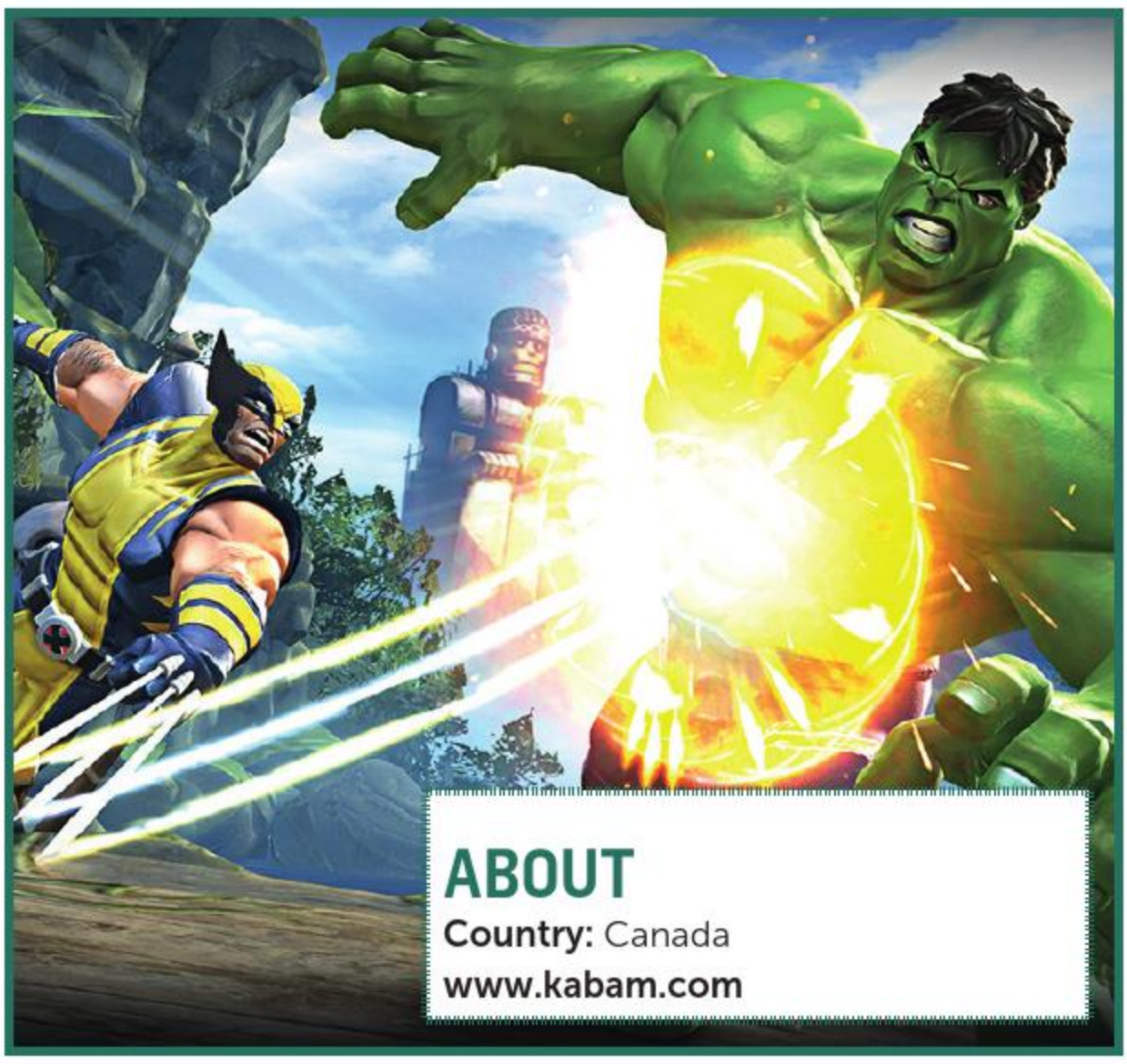
Country: China

www.netease.com

This is another of the Chinese telecoms giants that have actually had more of an impact on this list than you might think. It's been the local operator and publisher for Blizzard for years, and has propped up other online games, too.

But here we're just focusing on its *Fantasy Westward* games, developed in-house and a major force in China on mobile and PC. On mobile alone, the series makes in excess of $100m. Netease has only just made its move in the West with the opening of a US subsidiary, so expect more from this company in this listing next year.

KABAM GAMES CANADA 42



ABOUT

Country: Canada

www.kabam.com

There's only one major game that gets this Vancouver team to the top, but it's super: *Marvel Contest of Champions*.

The game has reportedly made close to $120m already, benefitting from the general halo effect around any Marvel-related brand. *Contest of Champions* is an free-to-play fighting game featuring Marvel heroes. As you might expect from a F2P game, microtransactions are the secret to the brawler's success.

Kabam Canada was actually formed in 2013 by acquisition – namely the purchase of Exploding Barrel Games, previously a start-up working on Facebook games.

43 CREATIVE ASSEMBLY

ABOUT

Country: United Kingdom

www.creative-assembly.com

Unfairly, *Alien: Isolation* was branded a flop by many, when it emerged the game had 'only' sold 1m units globally a few weeks after release. Critically, however, it was adored for its tense atmosphere and faithful recreation of many of the original film's tropes – and in actual fact the commercials added up as well.

We understand studio revenue for the year is around $115m, thanks not just to *Alien* but new *Total War* expansions to mobile and PC. A sequel to *Alien* is almost certain, and the *Total War* series recently expanded with a Warhammer partnership. Plus, Creative Assembly is developing *Halo Wars 2*.

44 TECHLAND

ABOUT

Country: Poland

www.techland.pl

The studio's zombie action game *Dying Light* has emerged as a bit of a rough diamond this year, and the Top 50 placing for Techland reflects the value it has built.

Techland has managed much of the delivery itself, although it has leant on the talented team at Warner Bros for sales and marketing of the boxed version.

The result shows a studio that knows how to work its audience – the game sold 3.2m in its first 45 days on the market earlier this year. It marks the beginning of a brave new chapter for the studio once best known for the *Call of Juarez* and *Dead Island* games.

FROM SOFTWARE 45

ABOUT

Country: Japan
www.fromsoftware.jp

Who would have thought that there was so much to make from a tranche of games where a high difficulty level, near-impossible bosses and a steep learning curve was the order of the day?

But in the *Dark Souls* series, and this year's PS4 exclusive *Bloodborne*, From Software has gone from being a seemingly niche Japanese developer to a mainstream star, and without compromising any of its principles.

2m copies of *Bloodborne* sold so far since March, and the studio's popular back catalogue and Steam releases should all add up to sales in excess of $110m.

NETHERREALM 46

ABOUT

Country: United States
www.netherrealm.com

You might scoff that the studio responsible for *Mortal Kombat*, which may have changed names and owner but is still under the stewardship of creator Ed Boon, makes it so high on this list. But under Warner Bros, this team has thrived. We estimate $100m in revenues over the last year, and the platform split is most interesting. It could be close to a third of its money made on mobile– unheard of for a typically console-centric studio. But superhero fighter *Injustice* on mobile is doing the business on the portable front, while *Mortal Kombat X* also made a strong impact. It's a business strategy that's proving as far from a fatality as possible.

47 EVOLUTION STUDIOS

ABOUT

Country: United Kingdom

www.evolutionstudios.co.uk

If the figures put out by UK developer Evolution Studios are correct, *Driveclub* for PS4 netted around $100m over the last year.

And that's despite it being one of a handful of games with high-profile technical issues around the launch and release. Proof that if you stay the course, you'll make it through.

Evolution is now dedicated entirely to the long-term development and growth of Driveclub, with reports suggesting the team has been scaled down to 55 people. It will be interesting to see where money generated from the game's microtransactions will put the studio in future listings.

48 ROCKSTEADY STUDIOS

ABOUT

Country: United Kingdom

www.rocksteadyltd.com

This is yet another Warner Bros-backed/owned studio in the No.41 to 50 stretch. If there's still talk of the squeezed middle in games publishing, the Hollywood firm certainly isn't feeling it.

Given our window of analysis – September 2014 to August 2015 – Rocksteady only has three months of sales from *Batman: Arkham Knight* to show for its efforts – generating around $90m from the two console SKUs.

Persistent issues with the PC version aside, the game has been generally very well received and was a suitably grandiose conclusion to the *Batman: Arkham* series.

ROVIO ENTERTAINMENT 49

Even now, six years after *Angry Birds* first catapulted onto the scene, was there any doubt that its creator would find a place in the 2015 *Develop 100*?

Granted, it can be argued the feathered phenomenon has had its heydey. Rovio has been very upfront about the challenges it has faced, most recently shedding some staff and restructuring its efforts.

But its winged heroes are still making good bank, with around $81m from software revenue in the last year.

Overall revenues are of course even healthier after licensing is taken into account, even if that has declined.

SPORTS INTERACTIVE 50

Back when this list was based on UK revenues, and back when *Football Manager* depended on selling physical discs to succeed, creator Sports Interactive would often ride high in the Top 20.

But managing No.50 with a very targeted game about a specific sport in a much wider global list is actually a far more impressive achievement.

Steam user numbers plus estimated downloads on console suggests to us revenues over the $75m mark. Digital certainly seems to be the biggest source of income for the studio, with downloads accounting for 82 per cent of *FM 2016*'s first week sales.

51 TURTLE ROCK STUDIOS

ABOUT
Country: United States
www.turtlerockstudios.com

On the one hand, $75m from five-vs-one monster multiplayer shooter *Evolve* – which was hotly tipped when announced and still debuted strongly despite a delay from 2014 to early 2015 – is a highly impressive revenue performance.

On the other hand, it's undoubted that parent firm 2K Games wanted more. Instead, user numbers have arguably stalled and sales on Steam have slowed.

It's unlikely the end of the franchise though, with this unique blend of premium game with DLC strategy ripe for a second pass. The Evolution will be televised.

52 PLAYGROUND GAMES

ABOUT
Country: United Kingdom
www.playground-games.com

Sometimes considered the 'B Team' to US-based *Forza Motorsport* developer Turn 10's 'A', Playground actually rises to a much harder challenge: it's open-world *Horizon* sub-series is tasked with keeping the racing game franchise interesting between tentpole releases and also present a more mainstream experience.

But clearly it's paying off – word is that the *Forza Horizon* SKUs have outperformed the core, more simulation-oriented *Forza* games in key territories. The UK developer led development on last year's acclaimed *Forza Horizon 2*, with some assistance from fellow British dev Sumo Digital.

KABAM GAMES SAN FRANCISCO 53

ABOUT

Country: United States
www.kabam.com

Quick quiz for you. Read the list below and ask yourself: what do Kabam San Francisco's key games have in common? *The Hobbit: Kingdoms of Middle-Earth, Dragons of Atlantis: Heirs of the Dragon, Wartune: Hall of Heroes, Heroes of Camelot.*

The answer? No, it's not the overuse of colons and dramatic subtitles – it's the emphasis on mid-core experiences and genre tropes.

It's a winning formula though: those four games alone made approximately $70m in the last 12 months, so expect more Something: Something of the Something titles to emerge next year.

GLU GAMES TORONTO 54

ABOUT

Country: Canada
www.glu.com

Yes, the shine has actually come off the Kim Kardashian game a bit. It was making millions a day on its debut, but now apparently averages 'just' $200,000 – it's a hard life, eh?

But crucially Glu's Toronto team has found a niche the growing firm plans to exploit. Celebrity-branded games on mobile have only just got started, and Glu already has deals to get Nicki Minaj, Katy Perry and Britney Spears fronting new social-casual puzzle and action games, with *The Transporter* star Jason Statham currently the star of a lucrative sniper/shooter games. Who will be next?

55 ARENANET

ABOUT

Country: United States

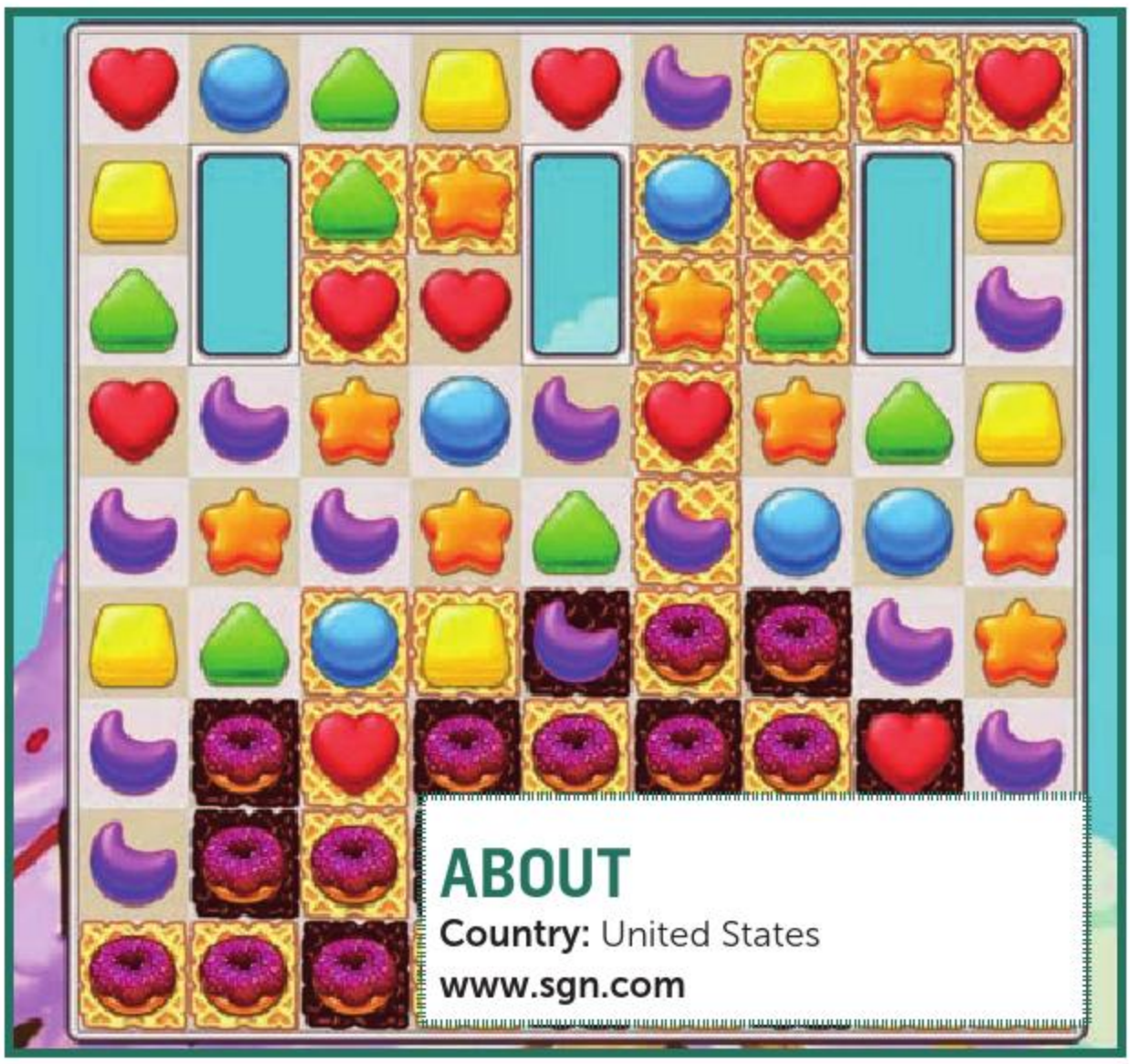
www.arena.net

Since thriving MMO publisher NCsoft – found further up the list at No.38 – is quite transparent with its quarterly revenues on a by-game basis we can confidently say that ArenaNet's popular *Guild Wars* franchise has netted around $70m in revenue for its creator in the last 12 months.

It should be noted that this does represent a slight decline year-over-year, but doesn't diminish its status as a tentpole title at NCsoft, or as one of the world's most popular MMOs.

The release of the latest expansion for *Guild Wars 2*, entitled *Heart of Thorns*, in October will no doubt further boost the firm's success.

56 SGN SAN DIEGO



ABOUT

Country: United States

www.sgn.com

While US-based games firm SGN remains a powerful publisher across a number of social and casual games – even publishing titles for Tic Toc, down at No.86 – its in-house team in San Diego are a core part of its offering.

Star game *Cookie Jam* – the firm's own take on the increasingly competitive confectionery-themed match-three genre – was actually voted by Facebook as one of the platform's best games of the year back in December 2014, and cited high user ratings as the gold stamp of approval, plus Facebook feature integration and overall audience growth.

FIRAXIS 57

ABOUT

Country: United States

www.firaxis.com

The studio run by veteran games developer Sid Meier has been branching out to add both mobile and PC titles to its offering over recent years so it seem its revenue mix is much healthier than you would assume for a company focused entirely on the seemingly niche strategy and simulation markets.

Of course, most of the money still comes from PC – Steam, specifically. Around $45m will have been made on that platform in the last year from games like *Starships* and *Civilization: Beyond Earth*, but we're giving it a healthy bump for expected back catalogue and boxed sales, plus roughly $5m from mobile.

KING BARCELONA 58

ABOUT

Country: Spain

www.king.com

The Spanish arm of King's growing casual gaming empire isn't responsible for a single title in the way its London, Malmo and Stockholm sister studios are.

Instead it is actually responsible for four of King's major games: *Bubble Witch 2 Saga, Diamond Digger Saga, Pyramid Solitaire Saga* and *Papa Pear Saga*, ticking the match-three, bubble-popping and card game boxes.

Between this quarter, King Barcelona is bringing in something in the region of $55m a year for its parent, making its titles a series of mid-tier hits that big companies like this cannot survive without.

59 SLIGHTLY MAD STUDIOS

ABOUT

Country: United Kingdom

www.slightlymadstudios.com

Retail revenue alone from this year's *Project Cars* should be within the $50 to $60m range, meaning that Slightly Mad is the second highest-grossing UK independent studio in this year's *Develop 100* ranking – and its game is the highest grossing UK-made new IP.

And don't forget the unique way Slightly Mad has been funded via audience donations. The studio was making crowdfunding bank long before it was cool to do so, accepting donations – as well as community contribution to the game's direction – through its own website rather than established crowdfunding platforms like Kickstarter.

60 KLEI ENTERTAINMENT

ABOUT

Country: Canada

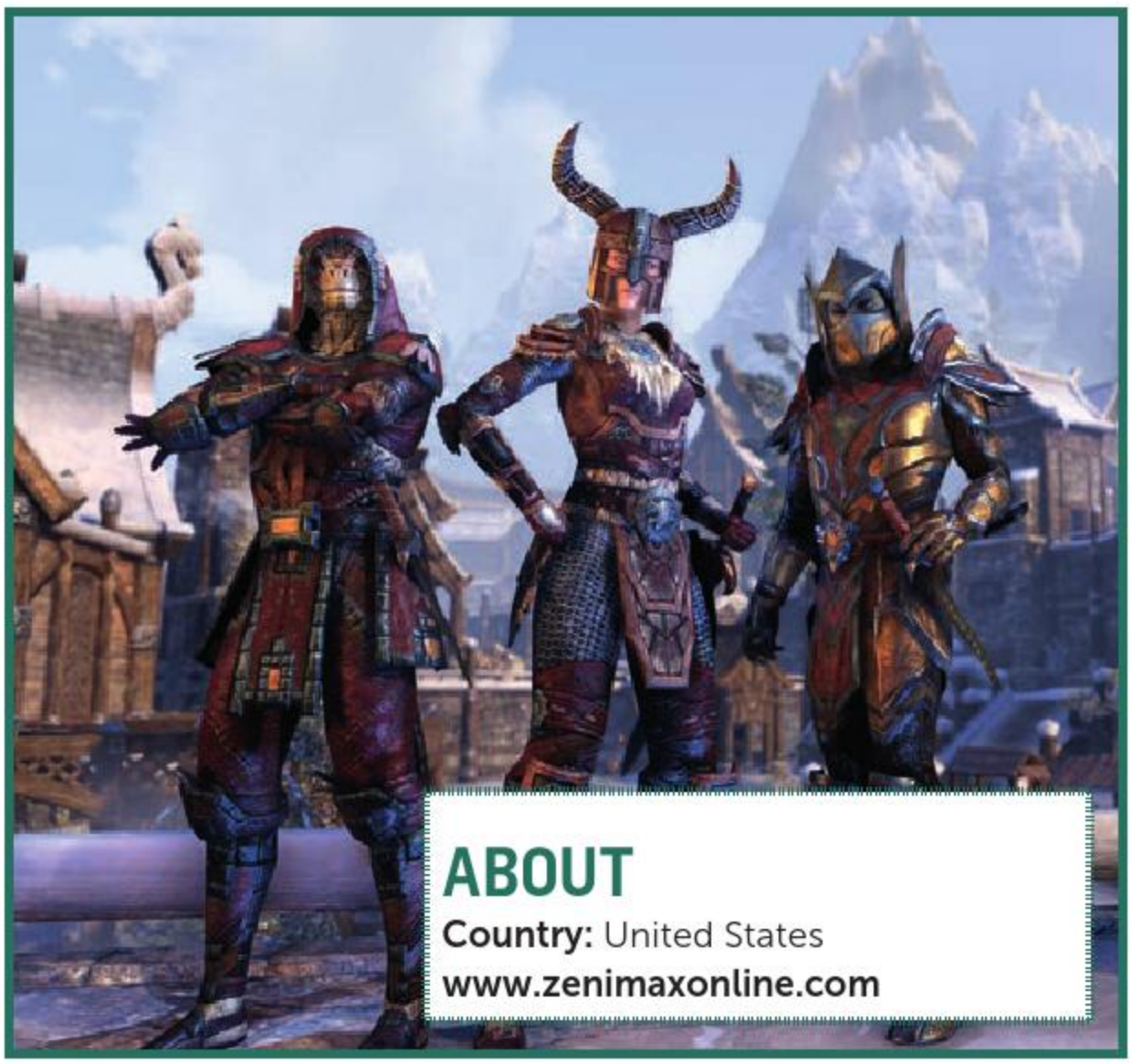
www.kleientertainment.com

Klei Entertainment is a Canadian independent studio with a number of games to its name – ranging from download hits like *Mark of the Ninja* and *Shank* – but the most significant is *Don't Starve*.

Since this wilderness survival game was released in 2013, the title has expanded to different formats and platforms, and its user numbers have in turn grown and grown.

Don't Starve has also become a popular game on leading streaming site Twitch, with its harsh save-mechanic-free permadeath design offering up lots of potential for variety and a game that's just as compelling to watch as it is to play.

ZENIMAX ONLINE STUDIOS 61



ABOUT

Country: United States

www.zenimaxonline.com

The Elder Scrolls Online was by no means a poor debut, but let's be honest – it's not made the impact most hotly-tipped MMOs have on their debut.

Even *Star Wars: The Old Republic* seems to have maintained a bigger audience. And it's not as if that's comparing apples and oranges – this is the online sister title to chart-topping RPG *Skyrim*.

But with something around $50m made last year – most of that through up front retail and download revenue – this was still a decent start for what is most likely a long-term game service. Now on consoles as *TESO: Tamriel Unleashed*, this has potential to grow.

READY AT DAWN STUDIOS 62

ABOUT

Country: United States

www.readyatdawn.com

Cinematic steampunk adventure *The Order: 1866* may have debuted to so-so reviews, but its commercial performance was actually above average, netting around $50m globally this year – and at least half of that was taken in Europe. No doubt the gloomy London setting resonated with audiences on the continent.

Sure, the PS4 exclusive benefitted from a demand for next-gen content and games for the currently dominant platform, but they shouldn't be reasons to downplay the success of Ready at Dawn. This was a strong start for a promising new IP, and lays the groundwork for future growth.

63 VISCERAL GAMES/EA DICE

ABOUT

Country: United States (Visceral) / Sweden (EA)
www.ea.com
www.dice.se

The core principle of *Battlefield* may not have changed much in its 13 years but its fortunes definitely have.

We've come a long way from its multiplayer origins through to a *Call of Duty*-rivalling ascendance via download-only iterations and then the latest game, *Battlefield Hardline*. It's a bit of a curveball, going big on single-player cinema-level flair – although the multiplayer was as much a priority – and while the game performed well enough commercially, it didn't sell or review as well as the games in the series usually do.

Of course, DICE will benefit most in next year's listing from a certain *Star Wars* game.

64 THE SIMS STUDIO / MAXIS

ABOUT

Country: United States
www.thesims.com
www.maxis.com

A combined entry this year for the team at Electronic Arts looking after *The Sims* and *Sim City*. Although very different games now, their shared lineage, management and development resource makes it hard to extrapolate so its best to consider it as a whole.

The Sims may have lost some of it audience, but hasn't lost its charm, with mobile versions introducing the series to a new range of casual and perhaps PC-less players.

Meanwhile *Sim City* seems to have survived the controversy around its previous PC iteration and is now a blockbuster free-to-play mobile game in the form of *Sim City: Build It*.

COLOSSAL ORDER 65

ABOUT
Country: Finland
www.colossalorder.fi

It's fitting to see this entrant sneaking up just behind Maxis. Because it was Colossal Order's *Cities: Skylines* – released earlier this year – that proved there isn't just life in the city building genre, but room for competition too. All the more impressive given the studio's smaller headcount of just 14 developers.

The game had a very strong debut for the Finnish studio, selling 1m copies just over a month after release. We're pegging its revenues at around $45m so far this year. This is likely to grow as the firm continues to expand the game, working with its community to add new features.

CCP GAMES 66

ABOUT
Country: Iceland
www.ccpgames.com

We might have underestimated CCP Games' economic performance here, but going by its annual financial filings and wider industry activity it seems like the firm is going though a quiet patch.

Hardly surprising when it has had to write off its ambitious multiplatform first-person shooter *Dust* and invest in R&D for things like virtual reality – its *Valkyrie* space dogfighting game is one of the hotly-tipped Oculus Rift titles.

The *EVE Online* universe continues, however, with more effort going into highlighting the player-created stories the MMO is famed for, and no doubt plans for more expansions.

67 IVORY TOWER/UBISOFT REFLECTIONS

ABOUT

Country: France (Ivory Tower) / United Kingdom (Reflections)

www.ivory-tower.fr

reflections.ubisoft.com

Pundits had been quick to brand Ubisoft's *The Crew* a bit of a flop, but word from inside the firm's studios suggest that its performance was in line with expectations.

Certainly, Ubisoft HQ must have been happy enough with it – at the time of writing it had just moved to acquire Ivory Tower. The studio was originally founded in 2007 but after a run of work for hire gigs *The Crew* was its first major release.

Note that credit is shared with Reflections here as the Newscastle-based team were drafted in as extra resource during production, co-developing the open-world racer.

68 MINICLIP PORTUGAL

ABOUT

Country: Portugal

www.miniclip.com

Although Miniclip is best known in the industry for its publishing efforts and casual games platform, most don't realise it has in-house resource as well.

The Portugal team are responsible for developing *8 Ball Pool*, which originally was a browser game on the Miniclip.com site, but has been kept alive through ports and upgrades – and is now one of the year's Top 200 grossing mobile games.

It's a prime example of previously browser-focused social games companies making the leap to mobile successfully and will no doubt expand in future.

PSYONIX 69

ABOUT

Country: United States

www.psyonix.com

Psyonix has been running for 15 years but it's really only been in the last few months where it has appeared on people's radars thanks to *Rocket League*.

A spiritual successor to the catchily-titled *Supersonic Acrobatic Rocket-Powered Battle Cars*, the footy-on-wheels game was hugely popular both as a PS Plus title for PlayStation 4 owners and on PC when it arrived on the two platforms this summer.

We're estimating revenues so far of $40m from the game, based on Sony's payment for PS Plus buyout, plus revenue from Steam main SKU sales and DLC.

KABAM GAMES BEIJING 70

ABOUT

Country: China

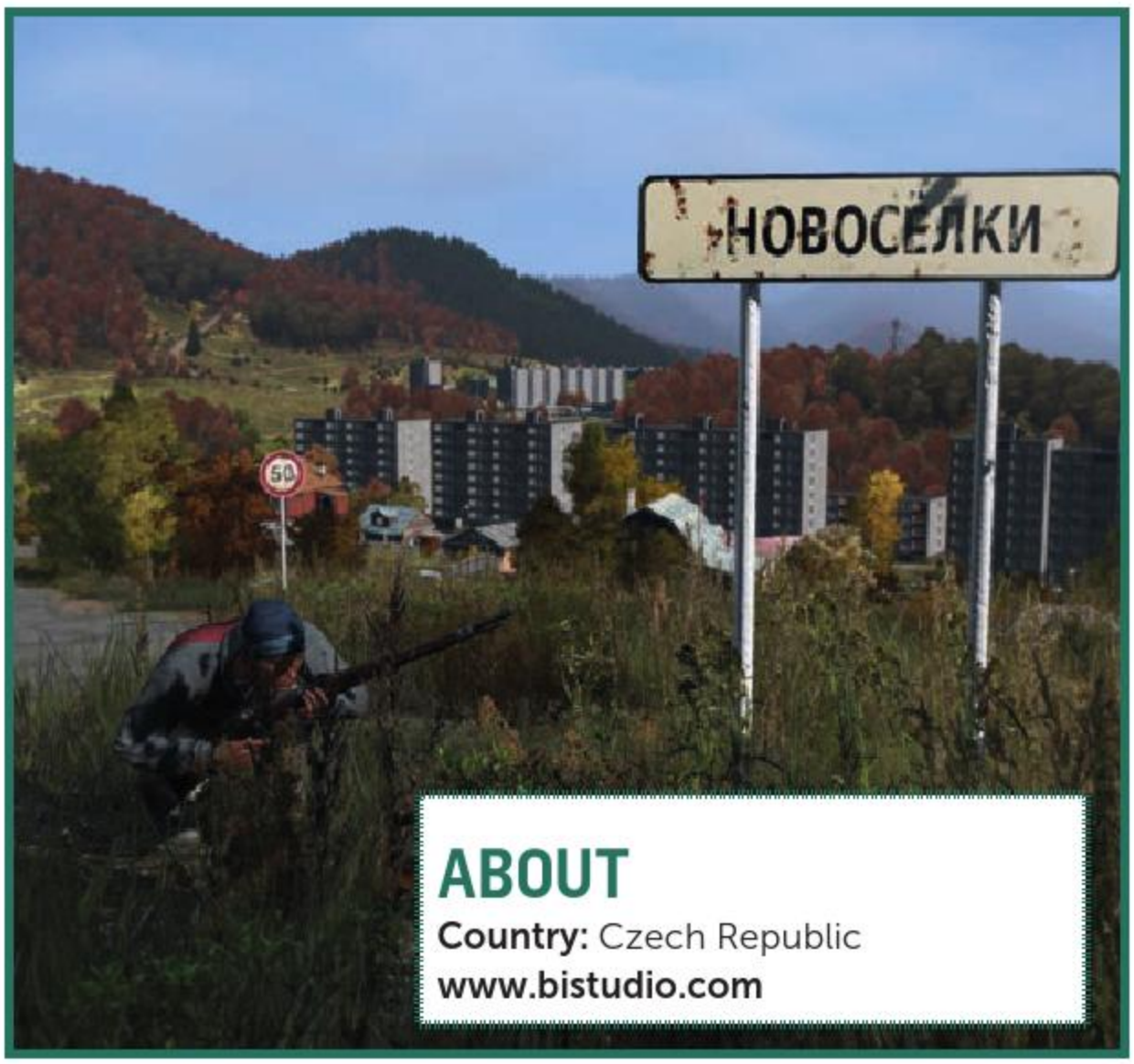
www.kabam.com

Kabam Games Beijing's *Kingdoms of Camelot: Battle for the North* was the studio's first hardcore game for mobile and was an important, and near immediate, step in reducing the firm's dependency on Facebook as a games platform.

Like many of those that are now big in mobile, Kabam started out by using the fractured PC games portal landscape and social sites to get its games to big audiences.

With *Camelot* alone still making it around $40m – and don't forget there are two other Kabam studios in this list at No.42 and No.53 – the move to mobile was, of course, the right one.

71 BOHEMIA INTERACTIVE



ABOUT

Country: Czech Republic
www.bistudio.com

The Czech outfit was originally formed in 1999 and produced the *Operation Flashpoint* series before switching to the *Arma* franchise in the mid-2000s.

Although Bohemia Interactive hasn't released a new game in the last two years, what keeps it at a decent position in this year's *Develop 100* listing is its games *Arma III* and zombie-themed survival spin-off *DayZ*.

The latter alone has sold around 1.5m copies in the last year, and both *DayZ* and *Arma III* have been strong sellers in the Steam charts. The studio is currently working on a standalone edition of DayZ for PlayStation 4 and Xbox One.

72 DAYBREAK GAME COMPANY

ABOUT

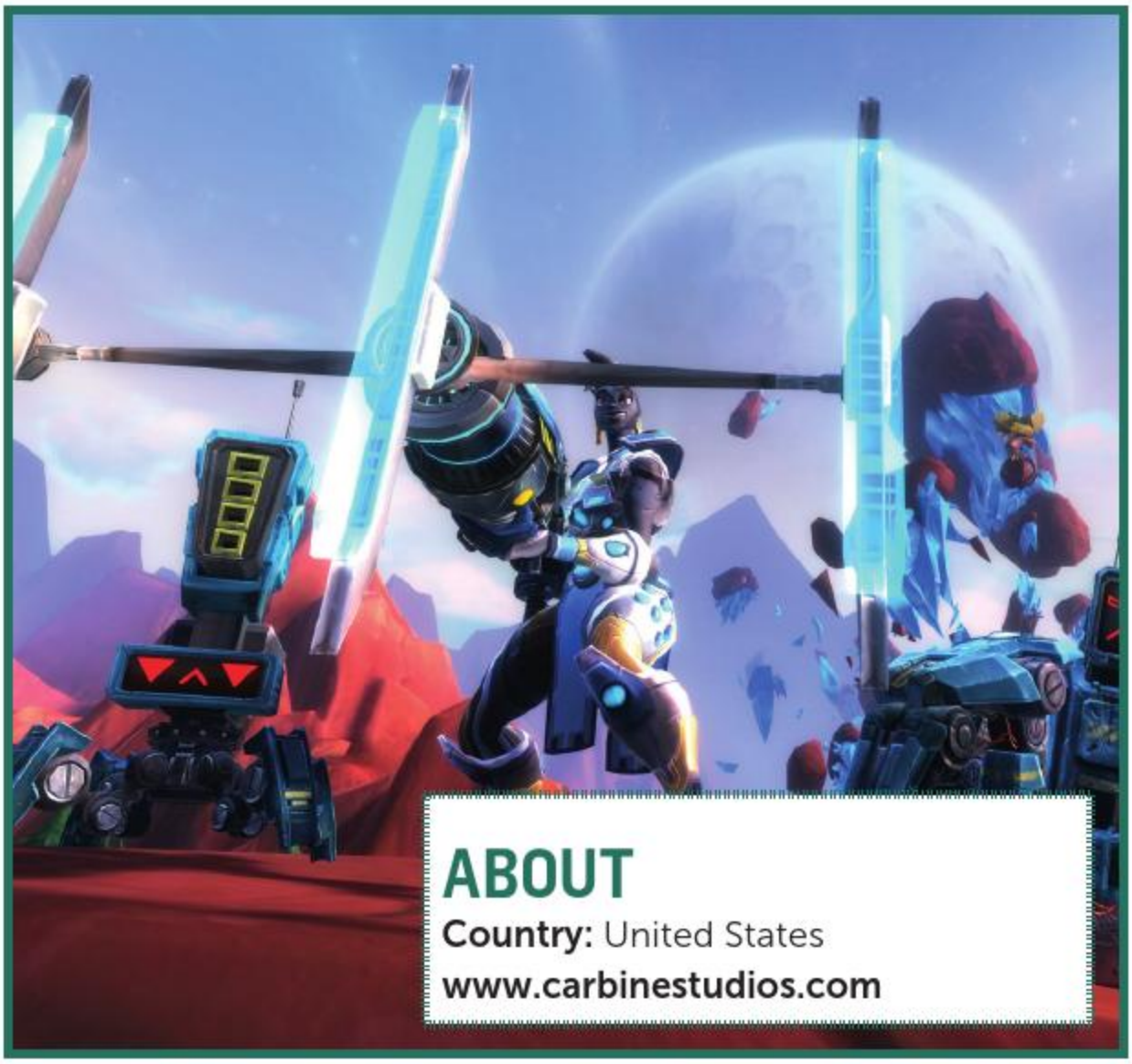
Country: United States
www.daybreakgames.com

Another mid-tier MMO player, this is the former Sony Online Entertainment studios that broke away under leader John Smedley, although the veteran MMO developer has since left the firm.

What gave it an immediate headstart once Sony disposed of it was the portfolio of games it develops and updates, such as *EverQuest* and *PlanetSide 2* – but the real success of late has been *H1Z1*, a zombie survival game that has been a big hit on Steam despite some initial technical issues and has already sold over 1m copies.

There are still some challenges ahead for Daybreak but it's a strong start for the new firm.

CARBINE STUDIOS 73



ABOUT

Country: United States

www.carbinestudios.com

It's unfair to call any MMO that generates revenue, in this climate, a disappointment. But it's probably fair to say that NCsoft and its in-house team Carbine had likely expected more from new title *WildStar*.

The game aimed to shake up the MMO market with different gameplay focuses for various player types, depending on their taste for exploration or combat.

With revenues nearing $39m don't expect them to give up just yet – especially when you consider that the game was years in development, and devised by former *World of Warcraft* leads, who know how to make a long-term project work better than most.

GENERA GAMES 74

ABOUT

Country: Spain

www.generagames.com

Genera Games is a Spanish studio operating in the mobile space. It predominantly works in partnership with several big IP holders.

Its titles include match-three puzzler *Star Trek: Wrath of Gems*, a Forest Gump-themed endless runner – yes, it's called *Run Forrest Run* – and interactive storybook *Star Wars Journeys: The Phantom Menace*. But by far the biggest is its *Frozen* game for Disney, *Frozen Free Fall*.

As with anything that Elsa sprinkles her frosty magic dust over, the game has instantly turned into a money-printing machine, netting around $40m in the last year.

75 SCOTT CAWTHON

ABOUT

Country: United States
www.scottgames.com

Potentially the highest single earner on this list, Scott Cawthon is the developer of the cult hit *Five Nights at Freddy's* games.

The studio is already on its fourth instalment of the series, the plot has been optioned for a Warner Bros movie, no less, and Cawthon is likely sitting to be on revenues of approximately $35m.

What's most impressive about the title is the YouTube audience that has grown up around *FNAF*, built up by players sharing videos of their gameplay experiences and also through in-depth discussion of the horror hit's intricate in-game lore.

76 NATURALMOTION BRIGHTON

ABOUT

Country: United Kingdom
www.naturalmotion.com

The *CSR Racing* games continue to perform well, if lower than the heights they have been accustomed to in previous years.

NaturalMotion Brighton was originally Boss Alien, formed by a team of ex-Disney Black Rock staff, but it joined the NaturalMotion family in 2012 – which itself was bought up by Zynga in 2014.

The success of *CSR Racing* will have no doubt have contributed to that latter deal, as the game unites F2P content with the core racing experience, proving that audience development really is possible on mobile with the right content.

STUDIO WILDCARD 77

ABOUT

Country: United States
studiowildcard.com

We've credited all of the revenues from *Ark: Survival Evolved* – which launched just a few months ago on Steam and has already jumped high into the charts – to Studio Wildcard, although it's worth noting that co-development duties are credited to Instinct Games, Efecto Studio and Virtual Basement.

Ark has actually only been in Early Access since June, with a formal finished version expected a year on, in June 2016, but the £20 entry fee and strong registered user numbers suggest that around $35m in revenue has been earned already by the Studio Wildcard title.

FRONTIER DEVELOPMENTS 78

ABOUT

Country: United Kingdom
www.frontier.co.uk

Frontier's recent flotation means that its public financial statements provide a pretty transparent situation of the company's finances. And by all accounts the Frontier Developments books have proved to be healthy.

Just over a year from the release of *Elite Dangerous* and Frontier's income is estimated to be around $35m, which suggests that the long wait for Braben's space sequel was well anticipated.

Don't forget that Frontier Developments also has an enviable back catalogue of content that has been made available for other publishers to take advantage of.

79 FACEPUNCH STUDIOS

ABOUT

Country: United Kingdom

www.facepunchstudios.com

Facepunch is another Great British development success story for the *Develop 100* list. But while founder Garry Newman has been an active member of the gaming community – the business is constructed around the *Garry's Mod* toolkit that he modded from *Half-Life 2* and Source in the mid-noughties – Newman does not actively court the press and media in the way that other indies might do.

Revenues from both *Garry's Mod* and the company's recent game *Rust* in the last 12 months should put Facepunch Studios at somewhere around the $34m revenue mark.

80 COM2US CORPORATION

ABOUT

Country: South Korea

us.com2us.com

Now owned by Gamevil, Com2us is a mobile and online games developer and publisher based in South Korea that is nearing its second decade in the business.

Although it does remain a mid-tier publisher, Com2us has a wide portfolio of games that have key audiences in Asia and which the firm has recently been hoping will expand over into Western territories via local offices that have been set up in North America.

Com2us' standout game is *Summoners War*, which alone is likely to be earning around $33m a year for the South Korea-set company.

SPACE APE GAMES 81

ABOUT

Country: United Kingdom

www.spaceapegames.com

Space Ape's latest effort, *Rival Kingdoms*, has only grown its stature further – the game was picked out to be Editors' Choice on the all-important App Store and has very strong user ratings with a global audience, which is especially strong in China.

Space Ape has also pioneered community marketing on mobile devices – it is one of the top three mobile developers currently active on Twitch.

The studio operates all local community operations in China, Japan and Korea from their Soho, London office where they employ people from 26 nationalities.

KING LONDON 82

ABOUT

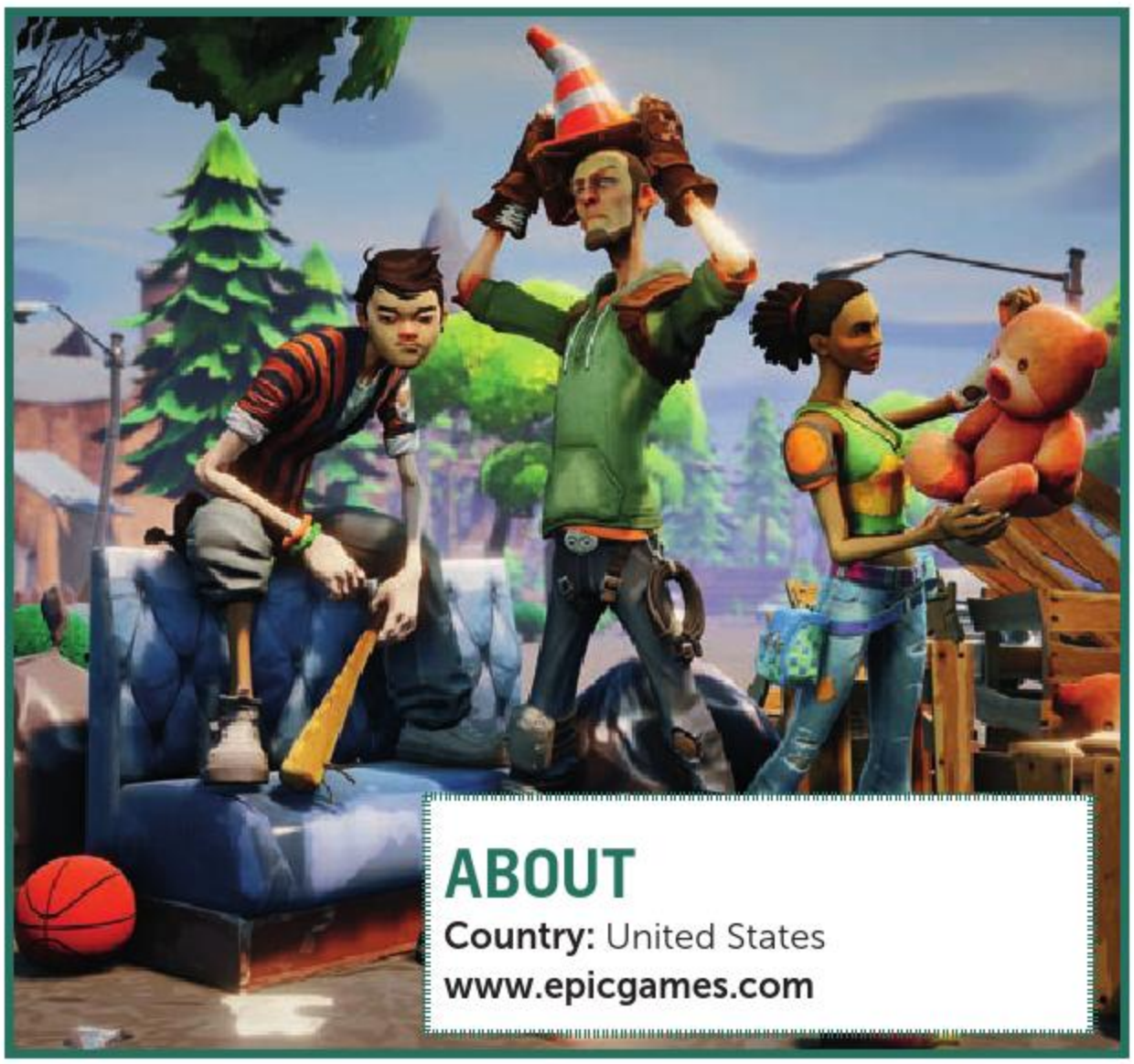
Country: United Kingdom

www.king.com

Although King's London operations are primarily dedicated to marketing and corporate offices, the studio it houses is still something of a cash cow. That's not bad for a team that is a mere three years old.

Responsible for *Farm Heroes Saga*, the King London team was originally founded by former EA Playfish veteran Catharina Lavers Mallet who moved over as Electronic Arts closed down its social games business in the UK. Lavers Mallet drew on her experiences running *The Sims Social* to build an expert team around her.

83 EPIC GAMES



ABOUT

Country: United States
www.epicgames.com

Strip away the lucrative and iconic engine licensing part of the business and it has actually been a relatively quiet time for the development side of Epic, which for this entry we are bundling into one.

For the record, the company has its main studio over in North Carolina plus People Can Fly and Chair, in Poland and Utah respectively. But we reckon that continued *Infinity Blade* revenue and its back catalogue comfortably keep the studio ticking over at this level. Expect a big spike once the Tencent-owned company's long-in-the-works F2P game *Fortnite* goes and hits full release.

84 2K AUSTRALIA

ABOUT

Country: Australia
www.2k.com

A bittersweet estimate this one, given the studio shut mid-2015. 2K Australia has a varied history – starting out as a sub-studio as part of *BioShock* creator Irrational and then a fully-fledged internal 2K developer in its own right.

The firm weathered so much, but wasn't able to survive direct action from its owner, who likely saw little reward in staffing a studio on another continent.

2K Australia's *Borderlands: The Pre-Sequel,* developed for 2K partner and original *Borderlands* creator Gearbox, made something around $30m, with about two thirds of that on Steam.

CODEMASTERS 85

This is another British studio that has been challenged by those changing market dynamics but has ultimately clung on through focusing on what it does best. Namely: racing games.

Although we seem to be going through a period where that genre of games is proving to be less popular, Codemasters continues to plough the F1 trough and its own considerable franchise of rally and race games.

And with Indian media giant Reliance as Codemasters' majority stakeholder it should have the freedom and the support to keep on focusing on its strengths.

TIC TOC GAMES 86

Curiously, there is a minority of studios on this list that can be considered truly multi-platform, with work on the entirely different fields of home console, PC and mobile. And yet Hollywood's own Tic Toc games is one the few to do exactly that.

The indie studio's main revenues come from friendly mobile game *Panda Pop*. We reckon that game alone, published by SGN, has earned around $20 million for the company.

But Tic Toc Games has also produced a Wii U title together with a mixture of both licensed and original casual/ social games.

87 POPCAP

ABOUT

Country: United States

www.popcap.com

Although it has a vast back catalogue, it's fair to say that life at PopCap has calmed down in recent years. When EA acquired it in 2012, that took this once-envied team off the market, for good and ill. Of course, it was at the mercy of corporate changes and, yes, the inevitable reduction in workforce and scaling back kicked in. But arguably it gave it more freedom, too – the *Garden Warfare* spin-off of *Plants vs Zombies* is what gets it on the list with solid sales and a great critical reception. That kind of project, itself a parody of the projects big brother studios make, wouldn't have been possible as a risky indie.

88 MIND CANDY

ABOUT

Country: United Kingdom

www.mindcandy.com

Moshi Monsters creator Mind Candy was once the UK darling, but don't let recent company challenges suggest it is on the way out.

Certainly, the firm has had to lose some staff and admit it spent too much time and money on developing its *World of Warriors* property, but this is still one of the most progressive of UK studios, keen to embrace licensing and brand exploitation while also being fiercely protective of the kids audience playing its game online every day. An estimated $29m from software revenue isn't bad either – and that doesn't include all the licensing and spin-offs.

TRIPWIRE INTERACTIVE 89

ABOUT

Country: United States
www.tripwireinteractive.com

Two key franchises from this North American studio have held it on a promising trajectory: *Killing Floor* and *Red Orchestra*.

The two are continued strong performers in the Steam charts and are likely to be earning Tripwire Interactive over a whopping $25m in this year alone.

The two games, although separate franchises, both actually started out as *Unreal Tournament* mods – in fact it was *Red Orchestra* winning Epic's Make Something Unreal competition in 2004 that took the Tripwire team from being amateurs and into the professional world.

SOCIAL POINT 90

ABOUT

Country: Spain
www.socialpoint.es

Sure, another social mobile studio, another game featuring dragons. But this is not another Asian giant, Silicon Valley or London Tech scene start-up – Social Point heralds from Barcelona, Spain. It began life in 2008 as a Facebook game that, of course, expanded to mobile with its lead game currently *Dragon City*. By 2013 it was one of the fastest growing mobile games firms on the planet, attracting a $10m investment locally.
It gives back to and has a partnership with local schools and colleges that aims to address drop-out rates and unemployment by teaching students digital skills.

91 KING MALMO

ABOUT

Country: Sweden

www.king.com

As with the other King entries, we've split out each of the mobile/social-casual giant's games to its respective studios, despite plenty of cross-site operational activity going on behind the scenes.

The Malmo team in Sweden is responsible for *Pet Rescue Saga*, which is likely to be grossing at least $25m a year for the studio.

King Malmo, founded five years ago back in 2010, devised the *Pet Rescue* franchise which it first launched over on Facebook. However King Malmo then expanded the series onto mobile to capitalise on the expansive *Candy Crush* boom.

92 OBSIDIAN ENTERTAINMENT

ABOUT

Country: United States

www.obsidian.net

Those familiar with this RPG expert's recent softography might be surprised to hear it that needed the support of its community to survive. But Obsidian is another of the Kickstarter 'class of 2012'. For Obsidian the dream project was *Pillars of Eternity*. The RPG was released this year to acclaim and decent Steam user numbers – but not after financial scares thanks to the critical reaction to its *Fallout* instalment and the protracted development of *South Park: Stick of Truth*. Crowdfunding has given it a renewed life as a collaborative developer – it maintains a tech-sharing agreement with nearby inXile.

RARE 93

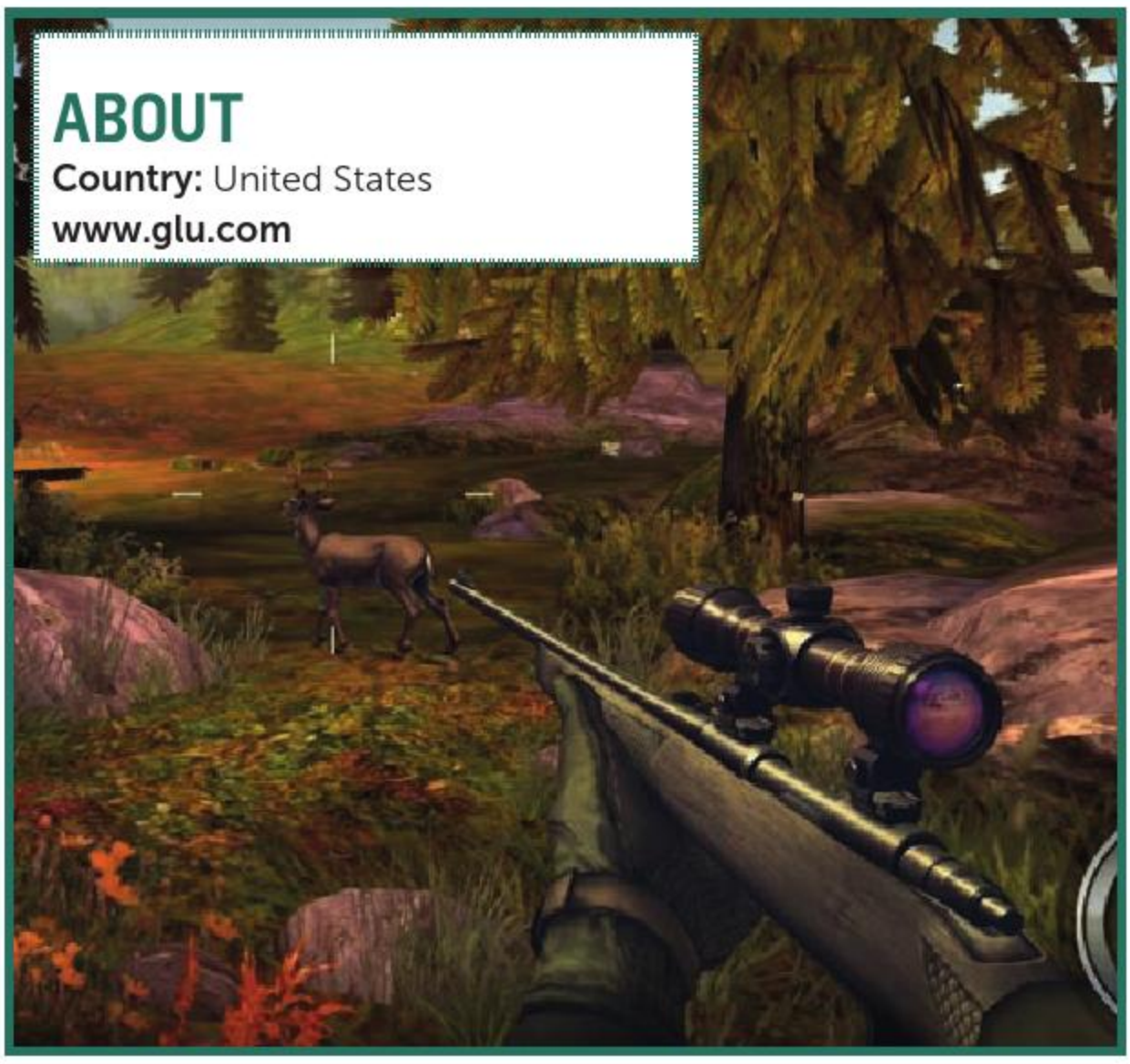
ABOUT

Country: United Kingdom
www.rare.co.uk

The outfit that is arguably the second-longest running UK studio (second to Jeff Minter's Llamatron) hasn't released a single game in our eligibility period. Instead it released 30, the compilation *Rare Replay* that celebrates the firm's history across games like *Blast Corps, Perfect Dark* and *Viva Pinata,* among others.

Inevitably, Nintendo-published classics developed by the now-Microsoft-owned studio were omitted, so it wasn't comprehensive – but it was an instant classic and a commercial hit to boot. It was a UK number one with nearly $25m of revenues in its opening release.

GLU MOBILE WASHINGTON 94



ABOUT

Country: United States
www.glu.com

This Glu subsidiary makes the ranking based predominantly on the performance of its *Deer Hunter* mobile games. You may be sniffy, but it's a cherished brand by its parent – worth around $20m in revenue each year for the mobile games giant, and most recently fiercely defended in a cloning lawsuit in the US. Glu alleged that a Canadian outfit copied *Deer Hunter's* look and feel but swapped animals for real people. The rival title was a similar cash cow (ahem) on the App Store, which Glu said was further proof of the copy – it had emulated the content so well, it was attracting players the way *Deer Hunter* was.

95 KOJIMA PRODUCTIONS

ABOUT

Country: Japan

www.konami.jp/mgs_portal

A seemingly inauspicious entry for what was once Konami's prize console studio – and a team which, if rumours are true, is almost totally dismantled, despite the very recent success of *Metal Gear Solid V: The Phantom Pain*.

It places here thanks to the release of *MGSV* prelude *Ground Zeroes*, a low priced prequel that established the main game's core mechanics and set up key plot beats.

Konami said the game had grossed well over 1m copies after a few months on sale. It was released in spring 2014 so we're estimating revenues in our eligibility period to be circa $20m.

96 COOL FISH GAMES

ABOUT

Country: China

www.chillingo.com

This small Beijing studio, as its name suggests, likes to play it cool. It currently has no web presence, except through its Chillingo-published mobile hit Iron Force, although a dedicated website is in the works at the time of writing.

Founded in March 2012, the studio is now home to around 20 people, but started out as a five-man indie with games like *Perfect Kick*.

Tank combat title *Iron Force* is Chillingo's highest revenue generating title in the last year, according to listings from Priori Mobile, which makes this a prized team – they just don't like to boast about it.

INXILE ENTERTAINMENT 97

ABOUT

Country: United States

www.inxile-entertainment.com

It's been good times of late for *Wasteland 2* developer InXile. The Brian Fargo-headed studio was one of the first of the big Kickstarter winners, with a crowdfund campaign in early 2012 that aimed for $900,000 actually ending near to three times that: $2.9m.

And it's also one of the few of the high-profile campaigns that made good on its promises. *Wasteland 2* arrived in late 2014 and Steam user numbers suggest it has banked something like $19m since release. It's also fitting that this studio sits close in the ranking to Obsidian, a developer with which it shares a strong bond (*see page 62*).

THE CHINESE ROOM 98

ABOUT

Country: United Kingdom

www.thechineseroom.co.uk

The Chinese Room is currently one of the most highly regarded UK studios, not just within the industry but by consumers, too.

This summer it released its biggest endeavour yet, the PlayStation-published *Everybody's Gone To The Rapture*. The game was a smash hit in the UK on release and global sales must surely have pushed the game's revenues to the $10m mark.

Rapture is both an accessible and challenging game, asking players to explore a deserted English countryside village. It's as worthy an entry in the English canon of 'what if' fiction as *Day of the Triffids* or *War of the Worlds*.

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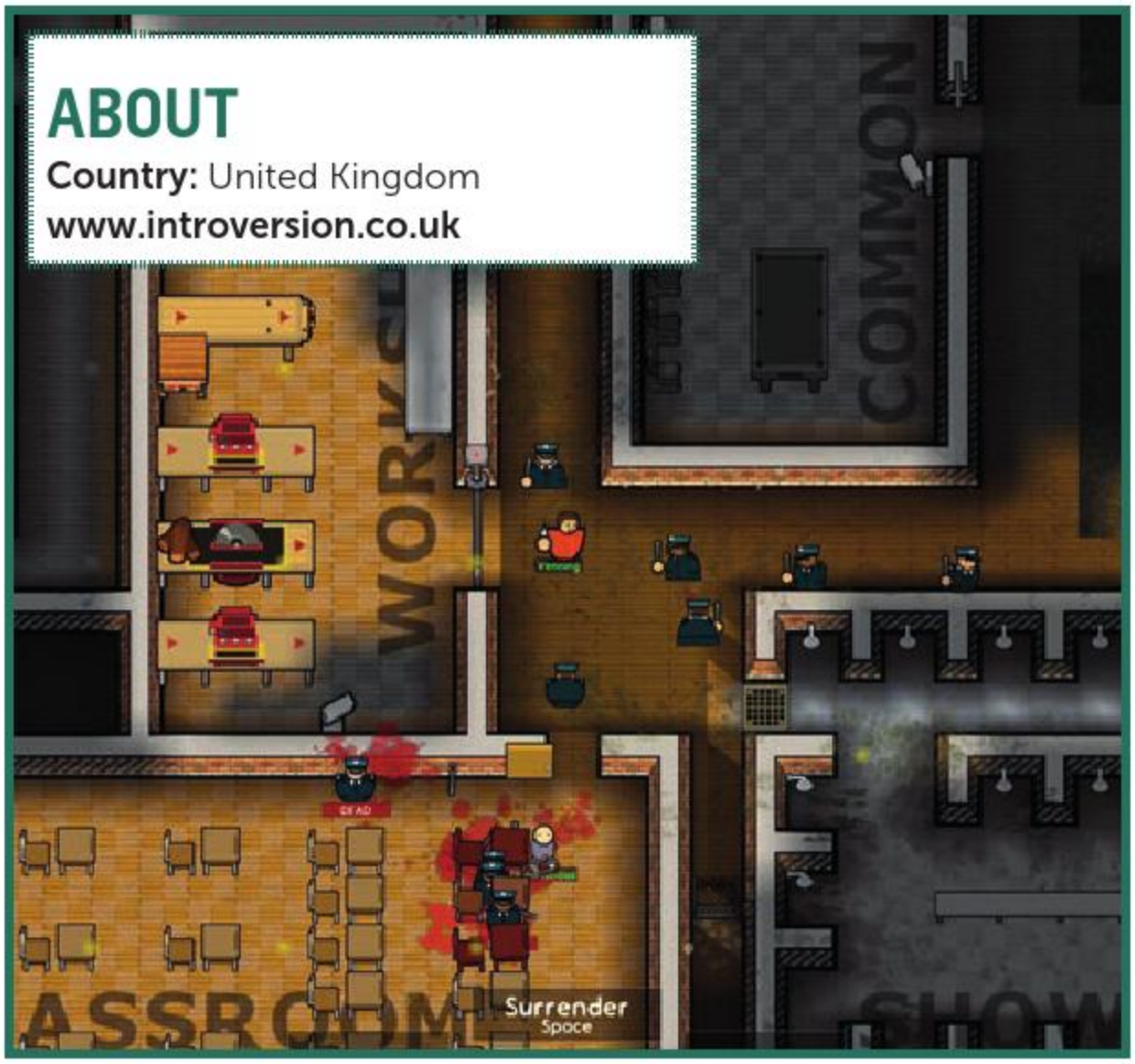
99 INTROVERSION



Once upon a time, this studio was not just the leading UK indie but one of the only ones. It pioneered the anti-publisher movement, opting to try digital platforms such as Steam and alternative distribution routes and relationships to get its games out, not always with consistent behind-the-scenes financial activity.

It's latest game, *Prison Architect*, has only just been officially released despite spending the prior four years in beta/Early Access with 37 major updates, where pre-orders raised nearly $10m by 2013. For the last 12 months, we're reckoning on a similar earning revenue in the build up to launch.

100 SUMO DIGITAL

The UK work-for-hire outfit has had an eventful year. From a product level, it has just left its most prolific period in some time, contributing to the likes of *Forza Horizon 2* and *Disney Infinity 3.0*, as well as developing *LittleBigPlanet 3*.

It has key partnerships for both PlayStation and Xbox, and for the latter is working on *Crackdown*. The confidence such large partners have in Sumo will likely come from its strong leadership – a gang who were recently ambitious enough to take over via an MBO. And a few months ago, another huge statement of its stature and potential: appointing Ian Livingstone as chairman.

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